

Making a Smart Choice

All great chefs have their “secret recipes.” With Security Benefit’s SmartChoice, financial professionals have the ability to leverage our expanded investment menu to design a plan’s investment lineup to meet their fiduciary value proposition and plan clients' needs.



The menu is complemented by a wide array of client services designed to help you create your own unique, secret recipe and grow your practice.

Open Architecture

SmartChoice’s open architecture investment menu gives you access to over 20,000 mutual funds.

No Proprietary mutual funds from Security Benefit

Flexibility to bundle the plan's TPA services with Security Benefit or utilize an independent TPA

Platform consistency: one platform, multiple plan types

Comprehensive Services

Choose the complementing services that Fit Your Practice

- Flexible 3(38) or 3(21) fiduciary solutions to fit your practice by Mesirow Financial
 - Online Plan Sponsor access, reports, and approvals
 - Online participant access for account review and transactions
 - Online enrollment: Quick Enroll option that takes less than two minutes
 - Dedicated team of specialists with 65 years of combined experience
-

Exceptional Participant Experience

Plan participants can access their accounts on-the-go with the [My Security Benefit](#) mobile app. Beyond account access, My Security Benefit encourages your participants to stay on top of their retirement planning through calculators and other tools.

[Visit our mobile app resource center for Financial Professionals](#)

Creating Your Unique Client Menu

SmartChoice's lineup of services along with the [My Security Benefit](#) mobile app are designed to give you, plan sponsors, and participants unparalleled experiences that create just the right blend for your practice and clients.

Get Started Today

If you would like to visit about SmartChoice or receive a Plan Proposal or comparison report, please contact one of our sales specialists at [800.747.5164](tel:800.747.5164), option 3, from 8 a.m. to 7 p.m. (Eastern Time), Monday through Friday.

SmartChoice Materials

- [Brochure - Financial Professionals](#)
- [Brochure - Fiduciary Options](#)
- [Brochure - Plan Sponsors](#)

Related Products

- [SmartChoice](#)
- [SecurePoint](#)
- [Workplace Retirement](#)

FINANCIAL PROFESSIONAL USE ONLY — NOT FOR USE WITH CONSUMERS

Investment advisory services are provided by Mesirow Financial Investment Management, Inc., a registered investment advisor. Mesirow Financial refers to Mesirow Financial Holdings, Inc. and its divisions, subsidiaries and affiliates. The Mesirow Financial name and logo are registered service marks of Mesirow Financial Holdings, Inc. © 2012, Mesirow Financial Holdings, Inc. All rights reserved. Security Benefit and its subsidiaries are not affiliated with Mesirow Financial.

The Security Benefit SmartChoice Retirement Program for ERISA Plans 401(k) and 401(a) products are Trust Accounts under §401 of the Internal Revenue Code. The Security Benefit SmartChoice Retirement Program for ERISA Plans 403(b)(7) ERISA product is a Custodial Account under §403(b)(7) of the Internal Revenue Code.

Recordkeeping services are provided by Security Financial Resources, Inc., a subsidiary of Security Benefit Corporation (Security Benefit).