

## Take Control of Portfolio Planning

Security Benefit's Portfolio Planner Powered by Morningstar® guides you through the process of creating a portfolio appropriate for your client's risk tolerance. This tool allows you to quickly allocate a portfolio by either target date fund or asset allocation model, making it easy to construct sound portfolios.

### It can also help to:

- Highlight fund stories and investment strategies for existing and new clients
- Deliver industry-leading portfolio analysis and reports during the annual review process
- Promote our diverse line of mutual fund and variable annuity products for your clients' asset consolidation and IRA rollover investment needs

[Access the Portfolio Planner Powered by Morningstar®](#)

You must be appointed and have an account on SecurityBenefit.com to access the platform. Find out how you can [get appointed](#) and [register for an online account](#).

PORTFOLIO  
PLANNER



- ✓ Engage clients
- ✓ Provide informed investment options
- ✓ Build business

### Report Highlights

The Portfolio Planner Powered by Morningstar® has the ability to pull a variety of reports to provide you with insights on how best to manage your client's portfolio.

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The **Portfolio X-Ray** report is used by advisors to reveal an instant view of how diversified a portfolio is based on the underlying holdings of every managed investment and individual security it contains by using:

- Asset allocation
- Stock analysis (stock sectors, world regions)
- Bond analysis (fixed-income sectors, portfolio %, benchmark %, maturity breakdown, credit quality breakdown)
- Investment style (style boxes)
- Top 10 net underlying holdings
- Portfolio holdings

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The **Stock Intersection** report is used by advisors to show the 50 largest individual stock holdings in the portfolio, ranked by % of portfolio's net assets. Information about each stock shown:

- Source of stock
- Ticker/ISIN
- Market value
- % of investments
- Holding portfolio date
- Sector

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The **Portfolio Comparison** report is used by advisors to contrast key performance and style characteristics of a current portfolio with a proposed portfolio to convey how it's more appropriate for a client or prospect by using:

- Asset mix comparisons
- Style box analyses
- Sector weightings
- Regional exposure
- Trailing returns
- Risk and returns statistics
- Modern portfolio theory statistics
- Portfolio holdings

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The **Investment Detail Report (IDR)** is used by advisors to show a detailed breakdown of a single fund contained within the portfolio.

- Performance
- Returns and risk profile
- Morningstar category
- Asset allocation
- Style
- Sector weightings
- Top holdings
- Ticker/ISIN
- Fees and operational

Your Sales Team is ready to show you how our Portfolio Planner Powered by Morningstar tool can provide new solutions to help you take care of customers, while also making it easier to build your business.

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