

# Workplace Retirement Program for ERISA Plans

## A low cost bundled solution for employer-sponsored ERISA plans.

### Key features

- Low-cost Target Date Funds<sup>1</sup>
- Streamlined Enrollment
- Low-cost Vanguard Index Funds and Mesirow Financial<sup>®</sup> Asset Allocation Models
- 3(38) Fiduciary Services

Security Benefit has partnered with [Mesirow Financial](#) to create Security Benefit Workplace Retirement Program. As the contracted 3(38) investment fiduciary to plan sponsors who choose Workplace Retirement Program for ERISA plans, Mesirow Financial is responsible for the investment selection, investment monitoring, and investment replacement under the plan.

Security Benefit is unique because we distribute our products and platforms through independent financial professionals who live and work in your community. We want you to have the choice of who you want to work with versus providers who use captive representatives or an enroller.

We have put together a streamlined enrollment process so you and your employees have an efficient way to make investment choices. We've included an investor quiz by Mesirow to help employees determine their risk tolerance along with three enrollment options.

### Employees can choose:

1. Vanguard Target Date Funds<sup>1</sup>
2. Low-cost Vanguard Index Funds and Mesirow Asset Allocation Models
3. Build your own portfolio
  - [Monthly Performance](#)
  - [Quarterly Performance](#)

**For more information contact your financial professional or call us at [800.747.5164](tel:800.747.5164), option 3.**

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<sup>1</sup>The principal value of target date funds is not guaranteed at any time, including at or after the target date, which is the approximate date when investors turn age 65. The funds invest in a broad range of underlying mutual funds that include stocks, bonds, and short-term investments and are subject to the risks of different areas of the market. The funds emphasize potential capital appreciation during the early

phases of retirement asset accumulation, balance the need for appreciation with the need for income as retirement approaches, and focus more on income and principal stability during retirement. The funds maintain a substantial allocation to equities both prior to and after the target date, which can result in greater volatility.

## At a glance

**Product name:** Workplace Retirement Program for ERISA Plans

**Product type:** Mutual Fund

**Minimum Purchase:**

**Account Type(s):** 401(a)

**Surrender Charges:**

**Strategy:** Multiple investment options with 3(38) Fiduciary Services

[Compare Product](#)

**You should consider the investment objectives, risks, charges, and expenses of the mutual funds carefully before investing. You may obtain prospectuses or summary prospectuses (if available) that contain this and other information about the mutual funds by calling our Service Center at 800.888.2461. You should read the prospectuses or summary prospectuses (if available) carefully before investing. Investing in mutual funds involves risk and there is no guarantee of investment results.**

The Mesirow Financial Investment Strategies division of Mesirow Financial Investment Management, Inc., an SEC-registered investment advisor (Mesirow Financial) has provided the following investment option information as a result of its qualitative and quantitative research process. It is the participant's responsibility to select which investment options from this list meet the participant's investment objectives and risk tolerances as Mesirow Financial has not selected these investment options on the participant's behalf. Mesirow Financial retains all rights, title and interest in and to any pictorial, narrative or other written or graphical presentation of all other material contained herein. The Mesirow Financial name and logo are registered service marks of Mesirow Financial Holdings, Inc. © 2023, Mesirow Financial Holdings, Inc. All rights reserved.

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