Global Community Charter School

SECURITY BENEFIT

SFR® 403(b)(7) Plan

NON-ERISA
ENROLLMENT BOOKLET

Security Benefit®

Security Benefit®
TO AND THROUGH RETIREMENT

430 W. 7th Street
Suite 219141
Kansas City, MO 64105-1407

SecurityBenefit.com

Dear participant,

Congratulations. You've made a smart move. Not only have you wisely committed to saving for your retirement, you've also chosen the SFR® Program from Security Benefit. Those are two good decisions.

Your next steps are simple: Sign Up, Contribute, Invest and Consolidate.

- **Step 1: Sign Up**
  - Tell us about yourself: name, address, beneficiaries, etc.
- **Step 2: Contribute**
  - Decide how much to save each pay period.
- **Step 3: Invest**
  - Choose an investment strategy:
    - A single fund solution with target date funds from T. Rowe Price
    - Select your own allocation from more than 40 investment options
- **Step 4: Consolidate**
  - To simplify your retirement planning, you can consolidate your other eligible retirement assets into your new Security Benefit SFR account. Just fill out the transfer/rollover form on page 10 to consolidate.

Security Benefit is pleased to join with your employer to provide a quality retirement plan that will help meet your long-term financial goals. We look forward to serving you for many years to come.

If you have any questions about your new retirement plan, please contact your financial professional or call Security Benefit at 800.747.3942.

Sincerely,

Security Benefit
Retirement Plan Services

SFR® Program 403(b)(7) Voluntary Participant Enrollment Form

Questions? Call our National Service Center at 800.747.3942.

Instructions

Complete the **entire** form to establish your 403(b)(7) Voluntary Account. Be sure your contribution amounts do not exceed IRS contribution limits. Your financial professional can assist you in completing this form. Please type or print.

Step 1: Sign Up

Provide Employer Information

Name of Employer ______________________ **Plan Number** ______________________

Provide Personal Information

Participant Name ______________ First ______ MI ______________ Last ○ **Male** ○ **Female**

Social Security Number ______________________ **Date of Birth** ______________ (mm/dd/yyyy)

Mailing Address ______________ Line 1 ______________ Line 2

______________ City ______________ State ______________ Zip Code

Residential Address ______________ Line 1 ______________ Line 2

(if different from mailing address.) (Residential Address is a required field if Mailing Address is a PO Box)

______________ City ______________ State ______________ Zip Code

Daytime Phone Number ______________ **Mobile / Home Phone Number** ______________

Personal E-mail Address ______________________

Date of Hire ______________ (mm/dd/yyyy) **I am retired. My retirement date was** ______________ (mm/dd/yyyy)

Continued on Next Page ▶

Step 2: Contribute

Please complete this section ONLY if you are contributing through salary reduction. Provide your employer a copy of this form to serve as your salary reduction agreement.

Choose all that apply. Verify with your Employer availability of Roth contributions.

☐ Deduct from my salary:

- ☐ Pre-tax Qualified Contribution of $ ____________ or ________% per pay period.
- ☐ After-tax Roth Contribution of $ ____________ or ________% per pay period.

☐ Catch-Up* Amount:

- ☐ Pre-tax Qualified Contribution of $ ____________.
- ☐ After-tax Roth Contribution of $ ____________.

**If you indicated a catch-up amount, please select one of the following:*

○ Age 50+

○ 15 Years of Service

Total $ __________ or ________% per pay period.

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Step 3: Select Your Investments – Select only one choice.

If no direction is provided, your existing account balance and future contributions will be invested in your employer's designated default fund.

Choice 1 – Target Date Fund

I elect my age appropriate target date fund:

____________	**T. Rowe Price Retirement 2010**	____________	**Vanguard® Target Retirement 2015**
____________	**T. Rowe Price Retirement 2015**	____________	**Vanguard® Target Retirement 2020**
____________	**T. Rowe Price Retirement 2020**	____________	**Vanguard® Target Retirement 2025**
____________	**T. Rowe Price Retirement 2025**	____________	**Vanguard® Target Retirement 2030**
____________	**T. Rowe Price Retirement 2030**	____________	**Vanguard® Target Retirement 2035**
____________	**T. Rowe Price Retirement 2035**	____________	**Vanguard® Target Retirement 2040**
____________	**T. Rowe Price Retirement 2040**	____________	**Vanguard® Target Retirement 2045**
____________	**T. Rowe Price Retirement 2045**	____________	**Vanguard® Target Retirement 2050**
____________	**T. Rowe Price Retirement 2050**	____________	**Vanguard® Target Retirement 2055**
____________	**T. Rowe Price Retirement 2055**	____________	**Vanguard® Target Retirement 2060**
____________	**T. Rowe Price Retirement 2060**	____________	**Vanguard® Target Retirement 2065**

Choice 2 – Asset Allocation Portfolios With Core Index Funds

I have taken the Investor Risk Quiz and based on my score and time horizon, I choose the following passive asset allocation portfolio with core index funds. Select only one model.

○ **Conservative**		○ **Moderate Conservative**		○ **Moderate**		○ **Moderate Aggressive**		○ **Aggressive**	
Fund Name		**Fund Name**		**Fund Name**		**Fund Name**		**Fund Name**	
Vanguard® 500 Index	13%	Vanguard® 500 Index	24%	Vanguard® 500 Index	33%	Vanguard® 500 Index	36%	Vanguard® 500 Index	42%
Vanguard® Mid Cap Index	2%	Vanguard® Mid Cap Index	4%	Vanguard® Mid Cap Index	6%	Vanguard® Mid Cap Index	9%	Vanguard® Mid Cap Index	12%
Vanguard® Small Cap Index	0%	Vanguard® Small Cap Index	2%	Vanguard® Small Cap Index	5%	Vanguard® Small Cap Index	8%	Vanguard® Small Cap Index	10%
Vanguard® Developed Markets Index	5%	Vanguard® Developed Markets Index	10%	Vanguard® Developed Markets Index	16%	Vanguard® Developed Markets Index	22%	Vanguard® Developed Markets Index	26%
Vanguard® Total Bond Market Index	60%	Vanguard® Total Bond Market Index	48%	Vanguard® Total Bond Market Index	34%	Vanguard® Total Bond Market Index	25%	Vanguard® Total Bond Market Index	10%
JPMorgan U.S. Government Money Market or Fixed Account	20%	JPMorgan U.S. Government Money Market or Fixed Account	12%	JPMorgan U.S. Government Money Market or Fixed Account	6%	N/A		N/A	

An additional asset based fee of 0.45% applies to assets held in the Vanguard Funds.

Work with your financial professional to update. This is not a managed account.

Continued on Next Page ▶

Choice 3

I choose the following Target Portfolio by Mesirow Financial.

Fund Name	◯ **Conservative**	◯ **Moderate Conservative**	◯ **Moderate**	◯ **Moderate Aggressive**	◯ **Aggressive**
Allspring Fundamental Small Cap Growth Small Growth	N/A	2%	2%	4%	4%
Allspring Special Mid Cap Value Mid-Cap Value	N/A	2%	3%	4%	5%
American Funds® EuroPacific Growth Foreign Large Growth	3%	6%	10%	13%	16%
Guggenheim Total Return Bond Intermediate Core-Bond Plus	30%	24%	17%	13%	5%
JPMorgan Mid Cap Growth Mid Cap Growth	2%	2%	3%	4%	6%
JPMorgan U.S. Government Money Market Money Market - Taxable	20%	12%	6%	N/A	N/A
Pioneer Large Blend	4%	8%	11%	12%	14%
T. Rowe Price Growth Stock Large Growth	4%	6%	10%	10%	12%
Vanguard® 500 Index Large Blend	4%	8%	10%	12%	14%
Vanguard® Developed Markets Index Foreign Large Blend	3%	6%	9%	13%	15%
Vanguard® Small Cap Index Small Blend	N/A	N/A	2%	3%	4%
Vanguard® Total Bond Market Index Intermediate Core Bond	30%	24%	17%	12%	5%

***Target Portfolios are updated annually; but your account will not automatically update. Work with your financial professional to update. This is not a managed account.**

Continued on Next Page ▶

Choice 4

Select One of the Investment Options listed below: If no direction is provided, your existing account balance and future contributions will be invested in your employer's designated default fund.

○ **Option 1** – Choose the Professional Money Management Program – 100% of your account will be professionally managed on your behalf (additional enrollment form required).

○ **Option 2** – Choose your portfolio of investments by indicating your investment preferences below. Please use whole percentages totaling 100%.

Percentage	Fund Name
____%	Allspring Fundamental Small Cap Growth
____%	Allspring Income Plus
____%	Allspring Special Mid Cap Value
____%	Allspring Special Small Cap Value
____%	American Beacon Small Cap Value
____%	American Century Disciplined Core Value
____%	American Century Focused Dynamic Growth
____%	American Century Sustainable Equity
____%	American Funds® EuroPacific Growth**
____%	American Funds® Inflation Linked Bond
____%	American Funds® New World Fund®**
____%	Baron Real Estate
____%	BlackRock® Emerging Markets
____%	BlackRock® High Yield Bond
____%	BNY Mellon Midcap Index
____%	BNY Mellon Natural Resources
____%	BNY Mellon S&P 500 Index
____%	ClearBridge Mid Cap
____%	Guggenheim Macro Opportunities
____%	Guggenheim Total Return Bond
____%	Invesco Corporate Bond
____%	Invesco Discovery
____%	Invesco Global Opportunities
____%	Invesco Main Street Small Cap
____%	Janus Henderson Balanced
____%	Janus Henderson Enterprise[2]
____%	JPMorgan Large Cap Growth
____%	JPMorgan Mid Cap Growth
____%	JPMorgan U.S. Government Money Market[1]
____%	Loomis Sayles Global Allocation
____%	Nuance Mid Cap Value
____%	Pax High Yield Bond
____%	PIMCO High Yield Spectrum
____%	PIMCO Income
____%	PIMCO RAE Global ex-US
____%	PIMCO RAE US Small
____%	PIMCO StocksPLUS® Small Fund
____%	Pioneer**
____%	Pioneer Bond

Percentage	Fund Name
____%	T. Rowe Price Global Stock
____%	T. Rowe Price Growth Stock
____%	T. Rowe Price QM U.S. Small Cap Growth Equity
____%	T. Rowe Price Retirement 2010
____%	T. Rowe Price Retirement 2015
____%	T. Rowe Price Retirement 2020
____%	T. Rowe Price Retirement 2025
____%	T. Rowe Price Retirement 2030
____%	T. Rowe Price Retirement 2035
____%	T. Rowe Price Retirement 2040
____%	T. Rowe Price Retirement 2045
____%	T. Rowe Price Retirement 2050
____%	T. Rowe Price Retirement 2055
____%	T. Rowe Price Retirement 2060
____%	Vanguard® 500 Index*
____%	Vanguard® Developed Markets Index*
____%	Vanguard® Emerging Markets Stock Index*
____%	Vanguard® Mid Cap Index*
____%	Vanguard® Real Estate Index*
____%	Vanguard® Small Cap Index*
____%	Vanguard® Target Retirement 2015*
____%	Vanguard® Target Retirement 2020*
____%	Vanguard® Target Retirement 2025*
____%	Vanguard® Target Retirement 2030*
____%	Vanguard® Target Retirement 2035*
____%	Vanguard® Target Retirement 2040*
____%	Vanguard® Target Retirement 2045*
____%	Vanguard® Target Retirement 2050*
____%	Vanguard® Target Retirement 2055*
____%	Vanguard® Target Retirement 2060*
____%	Vanguard® Target Retirement 2065*
____%	Vanguard® Target Retirement Income*
____%	Vanguard® Total Bond Market Index*
____%	Vanguard® Total International Bond Index*
____%	Victory RS Global
____%	Virtus AllianzGI Global Allocation
____%	Fixed Account[1]
Must Total 100%	

*An additional asset based fee of 0.45% applies to assets held in the Vanguard funds.

**To cover the cost of additional recordkeeping, an additional asset based fee of 0.10% applies to assets held in American Funds and Pioneer.

[1] Fund may not be available in all plans.

[2] This fund is not available to plans established after January 27, 2017.

For questions please consult with your financial professional.

Automatic Asset Rebalance (AAR) – Unavailable with Option "1" or Managed by Morningstar Program.

Check one Frequency below only if you wish to establish Automatic Asset Rebalance. Your account will be rebalanced on the first business day of the month according to the frequency selected. Frequencies are based on a calendar year.

Frequency: ○ **Monthly** ○ **Quarterly** ○ **Semi-annually** ○ **Annually**

Step 4: Provide Primary and Contingent Beneficiaries

Provide beneficiary designations. Use whole percentages that **total 100% for Primary and 100% for Contingent.**

	Primary Beneficiary (Full Legal Name)	**Social Security Number**	**DOB (mm/dd/yyyy)**	**Relationship to Participant**	**% of Benefit**
1.					
2.					
3.					
4.					
5.					

Must Total 100%

	Contingent Beneficiary (Full Legal Name)	**Social Security Number**	**DOB (mm/dd/yyyy)**	**Relationship to Participant**	**% of Benefit**
1.					
2.					
3.					
4.					
5.					

Must Total 100%

○ I have additional beneficiary designations and have listed them, in this same format, on page 8 in the **Additional Information** section. **Beneficiary must be marked as Primary or Contingent.**

Step 5: Provide Signatures

I understand and acknowledge that:

- I am permitted to direct my investments in this plan and I am responsible for the results of my investment directions.
- I have received and reviewed the information about investment choices and had the opportunity to freely choose how my contributions are to be invested.
- I should contact my financial representative to confirm the assessment of redemption fees and the availability of certain funds.
- Transactions may be requested via phone, Internet, or other electronic means by the Participant and/or financial representative based on instructions of the Participant. Security Distributors has established procedures reasonably designed to confirm that phone instructions are genuine. Neither the Fund nor Security Distributors will be liable for any loss, liability, or expenses arising out of any phone request, provided the procedures were followed. Thus, a stockholder may bear the risk of loss from a fraudulent or unauthorized request.

Tax Identification Number Certification

Under penalties of perjury I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (as defined in the IRS Form W-9 instructions).

You must cross out item 2 above, if you have been notified by the IRS that you are currently subject to backup withholding because of underreporting interest or dividends on your tax return.

I hereby: (1) acknowledge receipt and adoption of the Trust Agreement with UMB Bank, n.a. as trustee and (2) consent to the trust fees outlined in the Administrative Services Agreement. The Internal Revenue Service does not require your consent to any provisions of this document other than the certifications required to avoid backup withholding.

Important Information About Procedures For Opening A New Account

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account.

What this means to you: When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

X ______________________________ ______________ ______________________

Signature of Participant | Date (mm/dd/yyyy) | (You must include your designation if signing as a trustee, executor, custodian, guardian, or attorney-in-fact.)

GO PAPERLESS

Check all that apply

I elect to receive, electronically to my email address provided:

☐ **Statements** ☐ **Confirms** ☐ **Fund Documents** ☐ **Tax Forms**

Email Address ______________________________

Financial Professional – complete your information and sign:

THE FOLLOWING REPRESENTATIONS, WARRANTIES, AND CERTIFICATIONS APPLY WITH RESPECT TO THE PROVISION OF FIDUCIARY INVESTMENT ADVICE (AS DEFINED IN SECTION 3(21)(A)(iii) OF THE EMPLOYEE RETIREMENT INCOME SECURITY ACT OF 1974, AS AMENDED ("ERISA"), SECTION 4975(e)(3)(B) OF THE INTERNAL REVENUE CODE OF 1986, AS AMENDED (THE "CODE"), AND GUIDANCE ISSUED BY THE UNITED STATES DEPARTMENT OF LABOR), PROVIDED IN RELATION TO THE TRANSACTION CONTEMPLATED BY THIS FORM, INCLUDING ADVICE TO ROLL OVER (1) THE ASSETS OF A PLAN SUBJECT TO ERISA ("PLAN") TO ANOTHER PLAN, (2) PLAN ASSETS TO AN INDIVIDUAL RETIREMENT ACCOUNT DESCRIBED IN CODE SECTION 4975(e)(1)(B) THROUGH (F) ("IRA"), (3) AN IRA TO A PLAN, OR (4) AN IRA TO ANOTHER IRA

By signing below, I represent, warrant, and certify to Security Benefit that I have complied with the United States Department of Labor's Prohibited Transaction Exemption (PTE) 2020-02, in connection with the transaction contemplated by this form.

Without limiting the generality of the foregoing, I represent, warrant, and certify to Security Benefit that I:

(1) acted in accordance with the "Impartial Conduct Standards," including:

  a. the investment advice I provided regarding the transaction was in the Participant's best interest;

  b. the combined total of all fees I have received and will receive for my services does not exceed reasonable compensation within the meaning of ERISA Section 408(b)(2) and Section 4975(d)(2) of the Code; and

  c. I made no materially misleading statements to the Participant with respect to the recommended transaction and other relevant matters.

(2) made the following written disclosures to the Participant:

  a. an acknowledgment that I (and my supervising financial institution) am a fiduciary for purposes of ERISA and Section 4975 of the Code;

  b. a description of the services to be provided and my and my financial institution's material conflicts of interests, that is accurate and not misleading in any material respect; and

  c. Effective July 1, 2022 or as otherwise mandated by the United States Department of Labor, if my advice involved a rollover recommendation, documentation of the specific reasons for that recommendation.

(3) am not ineligible to rely on PTE 2020-02; and

(4) am in compliance with all applicable conditions of PTE 2020-02.

Additionally, I acknowledge that neither Security Benefit nor any of its affiliates is a fiduciary with respect to the Participant's transaction.

Printed Name ______________________ ____ ______________________
First MI Last

Financial Professional Number ______________________

E-mail ______________________ **Phone Number** ______________________

Broker Dealer or Firm ______________________

X ______________________ ______________________
Signature of Financial Professional Date (mm/dd/yyyy)

Additional Information

This space is provided for special instructions or additional beneficiary designations (Step 4). Each Beneficiary designation must be in the same format as in Step 4 and marked Primary or Contingent.

____

____

____

____

Mail to:

Security Benefit Retirement Plan Services
PO Box 219141
Kansas City, MO 64121-9141
Fax to: 816.701.7626

For expedited or overnight delivery:

Security Benefit Retirement Plan Services
430 W 7th Street STE 219141
Kansas City, MO 64105-1407

Visit us online at SecurityBenefit.com

Security Benefit®

SFR® Program Incoming Funds Request

Questions? Call our National Service Center at 1-800-747-3942.

Instructions

Use this form to transfer funds from your current carrier to Security Benefit. Complete the entire form. Please type or print.

1. The Participant should complete this Incoming Funds Transfer form.
2. Please contact your current carrier for any form requirements it may have for transferring money to another company.
   Note: If you are age 72 and unemployed, the Required Minimum Distribution must be completed by the current carrier prior to requesting this transfer of funds.
3. Obtain Signature Guarantee if required by your current carrier.
4. Upon receiving this material, Security Benefit will send this Incoming Fund Transfer Form, along with an acceptance letter to the carrier exchanging/transferring the assets.
5. If you are completing this form for a 403(b) or 403(b)(7) account/contract please contact your employer for any processing instructions the employer or third party administrator may require.

Notice to Current Carrier

This completed form and your current carrier's form along with a check made payable to Security Benefit for the benefit of the Participant listed on this should be mailed to:

Mail to:	**For expedited or overnight delivery:**
Security Benefit Retirement Plan Services	Security Benefit Retirement Plan Services
P.O. Box 219141	430 W. 7th Street STE 219141
Kansas City, MO 64121-9141	Kansas City, MO 64105-1407

Provide Security Benefit Account Information

Plan Number ____________________ **Plan Name** ____________________

Name of Participant ____________________ ________ ____________________
First MI Last

Mailing Address ____________________ ____________________
Line 1 Line 2

____________________ ____________________ ____________________
City State Zip Code

Social Security/Tax I.D. Number ____________________

Day Time Phone Number ____________________ **Mobile/Home Phone Number** ____________________

Indicate the type of account you would like to transfer your funds to (check one).

○ 401(a) ○ Roth 401(k)* ○ 457(b) Governmental

○ 401(a) Governmental ○ 403(b)(7) ○ Roth 457(b)*

○ 401(k) ○ Roth 403(b)(7)* ○ 457(b) Tax Exempt

**Roth assets can only be transferred to a Roth designated account.*

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Provide Your Current Carrier Information

Please fill out the name and contact information of your current carrier.

Current Carrier's Name ______________________________

Mailing Address: ______________________________ ______________________________
Line 1 Line 2

______________________________ ______________________________ ______________________________
City State Zip Code

Phone Number ______________________________ **Account Number for Current Carrier** ______________________________

Indicate the account type you have with your current carrier (check one).

○ 401(a) ○ 403(b) TSA ○ Roth 403(b)(7) ○ 457(b) Tax Exempt* ○ SEP-IRA

○ 401(k) ○ Roth 403(b) TSA ○ 457(b) Governmental ○ Traditional IRA ○ SIMPLE IRA

○ Roth 401(k) ○ 403(b)(7) ○ Roth 457(b)

Indicate the investment type you have with your current carrier (check one).

○ Annuity ○ Bank CD ○ Mutual Fund

If this request involves an annuity and your entire account balance, please check one of the following. My policy is:

○ Enclosed ○ Lost/Destroyed

**Can only transfer to another 457(b) Tax Exempt.*

Set up Transfer/Rollover Options

403(b)/403(b)(7) accounts only:

Please indicate one of the following

○ Transfer (prior employer 403(b) Plan to current employer 403(b) Plan)
○ Exchange (exchange of 403(b)/403(b)(7) assets from one provider to another provider within your current employer's Plan)
○ Rollover (not like to like, for example 457 to 403(b)(7), etc.)

All other accounts other than 403(b)/403(b)(7)

Type of Transfer/Rollover

○ Rollover (not like-to-like, for example 457 to IRA, etc.)
○ Transfer (like-to-like, for example, 457 to 457, IRA to IRA, etc.)

Amount of Transfer/Rollover

○ Liquidate my entire Account: Estimated Value $ ______________________
○ Liquidate a specified amount: Amount to Transfer $ ______________________
○ Transfer over ____________ years
○ Monthly ○ Quarterly ○ Semi-Annually ○ Annually

Distribution Requirements (if applicable)

I certify that applicable requirements have been met for distribution. Check all that apply:

☐ Age 59 ½ ☐ Disabled ☐ Severance from employment on ____________________
Date (mm/dd/yyyy)

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Provide Investment Direction

Refer to the Fund Investment Options Sheet (Fund List) available online at www.SecurityBenefit.com on the Forms page. Indicate your investment preferences below using whole percentages totaling 100%.

○ As indicated on the enrollment form; or for an existing account, to the allocations on file.

○ According to the Investment Allocations indicated below. Indicate whole percentages totaling 100%.

If no option is indicated above, the funds will be invested according to the allocations on file or the plan's default option.

Percentage	**Fund Name**
______ %	______
______ %	______
______ %	______
______ %	______
______ %	______
______ %	______
______ %	______
______ %	______
______ %	______
______ %	______

Must Total 100%

Provide Signatures

As the Participant, I understand, acknowledge and certify that:

- I am responsible for tax consequences which could include the imposition of penalties, additional taxes and interest. Security Benefit assumes no responsibility or liability for any effects of this transaction.
- I am aware of my right to receive information regarding my current account, including account values.
- I certify that the information provided is correct and complete.
- I should contact my Financial Professional to confirm the assessment of redemption fees and the availability of certain funds.

X ______________________ ______________ ______________

Signature of Participant | Date (mm/dd/yyyy) | (You must include your designation if signing as a trustee, executor, custodian, guardian, or attorney-in-fact.)

X ______________________ ______________ ______________

Signature of Plan Sponsor or Third Party Administrator | Date (mm/dd/yyyy) | Title

(If applicable – Please consult your Financial Professional or employer)

Notice for persons residing in a community property state: (1) the contract or proceeds thereof may be considered community property; (2) Security Benefit will administer the contract according to its terms, i.e., the owner can exercise all rights and privileges under the contract; (3) you are encouraged to consult with your legal counsel regarding any community property questions or concerns prior to effecting this transaction. The owner is solely responsible for determining the rights of the owner's spouse with respect to the contract and any transactions involving the contract. Security Benefit makes no representation regarding the characterization of the contract or the benefits thereunder as community property.

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If you are transferring funds to or from an ERISA Plan or to or from an IRA, your Financial Professional must complete this section and sign below.

THE FOLLOWING REPRESENTATIONS, WARRANTIES, AND CERTIFICATIONS APPLY WITH RESPECT TO THE PROVISION OF FIDUCIARY INVESTMENT ADVICE (AS DEFINED IN SECTION 3(21)(A)(iii) OF THE EMPLOYEE RETIREMENT INCOME SECURITY ACT OF 1974, AS AMENDED ("ERISA"), SECTION 4975(e)(3)(B) OF THE INTERNAL REVENUE CODE OF 1986, AS AMENDED (THE "CODE"), AND GUIDANCE ISSUED BY THE UNITED STATES DEPARTMENT OF LABOR), PROVIDED IN RELATION TO THE TRANSACTION CONTEMPLATED BY THIS FORM, INCLUDING ADVICE TO ROLL OVER (1) THE ASSETS OF A PLAN SUBJECT TO ERISA ("PLAN") TO ANOTHER PLAN, (2) PLAN ASSETS TO AN INDIVIDUAL RETIREMENT ACCOUNT DESCRIBED IN CODE SECTION 4975(e)(1)(B) THROUGH (F) ("IRA"), (3) AN IRA TO A PLAN, OR (4) AN IRA TO ANOTHER IRA

By signing below, I represent, warrant, and certify to Security Benefit that I have complied with the United States Department of Labor's Prohibited Transaction Exemption (PTE) 2020-02, in connection with the transaction contemplated by this form.

Without limiting the generality of the foregoing, I represent, warrant, and certify to Security Benefit that I:

(1) acted in accordance with the "Impartial Conduct Standards," including:

   a. the investment advice I provided regarding the transaction was in the Participant's best interest;

   b. the combined total of all fees I have received and will receive for my services does not exceed reasonable compensation within the meaning of ERISA Section 408(b)(2) and Section 4975(d)(2) of the Code; and

   c. I made no materially misleading statements to the Participant with respect to the recommended transaction and other relevant matters.

(2) made the following written disclosures to the Participant:

   a. an acknowledgment that I (and my supervising financial institution) am a fiduciary for purposes of ERISA and Section 4975 of the Code;

   b. a description of the services to be provided and my and my financial institution's material conflicts of interests, that is accurate and not misleading in any material respect; and

   c. Effective July 1, 2022 or as otherwise mandated by the United States Department of Labor, if my advice involved a rollover recommendation, documentation of the specific reasons for that recommendation.

(3) am not ineligible to rely on PTE 2020-02; and

(4) am in compliance with all applicable conditions of PTE 2020-02.

Additionally, I acknowledge that neither Security Benefit nor any of its affiliates is a fiduciary with respect to the Participant's transaction.

X ______________________________ ______________ ______________________________
Signature of Financial Professional | Date (mm/dd/yyyy) | Print name of Financial Professional

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Obtain Signature Guarantee

Please obtain a Signature Guarantee ONLY if required by your Current Carrier.

You can obtain a Signature Guarantee from a bank, broker or other acceptable financial institution. A Notary Public cannot provide a Signature Guarantee.

X ______________________ ______________ ______________________
Signature of Guarantor | Date (mm/dd/yyyy) | Title or Name of Institution

Place Signature Guarantee Stamp Here

Security Benefit Acceptance

To be completed by Security Benefit. Security Benefit hereby agrees to accept the transfer of the proceeds identified on this form.

X ______________________ ______________ ______________________
Signature of Accepting Carrier | Date (mm/dd/yyyy) | Title

Mail to:

Security Benefit Retirement Plan Services
P.O. Box 219141
Kansas City, MO 64121-9141
Fax to: 816.701.7626

For expedited or overnight delivery:

Security Benefit Retirement Plan Services
430 W. 7th Street STE 219141
Kansas City, MO 64105-1407

Visit us online at SecurityBenefit.com

Risk Quiz and Asset Allocation Models

Security Benefit®

Investor Risk Quiz

This quiz can help you determine your investing comfort zone and the model that may best suit your goals and objectives. Add up the points from your responses and use the scoring guide on the following page to help you select your asset allocation model.

1. How would you best describe your investment experience and knowledge?		
I have very little or no investment experience and knowledge	**0 POINTS**	
I have some experience and knowledge about investments	**2 POINTS**	
I am very experienced and knowledgeable about investments	**4 POINTS**	
2. The main objective for my account is to:		
Avoid losses	**0 POINTS**	
Keep pace with inflation	**2 POINTS**	
Keep pace with the stock market	**4 POINTS**	
3. If my account lost 30% of its value over a short period of time, I would be:		
Extremely uncomfortable – I cannot accept large short-term losses	**0 POINTS**	
Slightly uncomfortable – I may be ok with a short-term loss as long as I have time to regain those losses	**2 POINTS**	
Comfortable – I have time to regain those losses	**4 POINTS**	
4. I am willing to accept a greater risk of losing money in my account for the potential of higher long-term returns:		
Strongly Disagree	**0 POINTS**	
Disagree	**1 POINT**	
Neutral	**2 POINTS**	
Agree	**3 POINTS**	
Strongly Agree	**4 POINTS**	
5. My account has $100,000 in it. I would move my money to a lower risk investment if it lost ____________ in one year.		
$5,000 (5%)	**0 POINTS**	
$10,000 (10%)	**1 POINT**	
$15,000 (15%)	**2 POINTS**	
$20,000 (20%)	**3 POINTS**	
I would not move my money at all	**4 POINTS**	
6. When attempting to achieve my investment goals:		
I do not want my account to lose any value, even if it will take longer to achieve my investment goals	**0 POINTS**	
I will accept small fluctuations in my account's value	**1 POINT**	
I will accept moderate fluctuations in my account's value	**2 POINTS**	
I will accept large fluctuations in my account's value	**3 POINTS**	
I will accept extreme fluctuations in my account's value	**4 POINTS**	
My Investor Score		

Asset Allocation Models

Find your total score in the chart below, along with your retirement timeline, to see what type of investment model may be best for you. This chart should serve only as a guide to help you determine your own investing comfort zone.

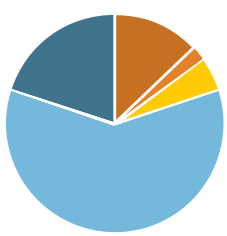
		My Investor Score				
		0-2 Points	3-8 Points	9-16 Points	17-21 Points	22-24 Points
Years Until My Retirement	0-3 Years	Conservative	Conservative	Conservative	Conservative	Conservative
	3-5 Years	Conservative	Moderate Conservative	Moderate Conservative	Moderate Conservative	Moderate Conservative
	5-7 Years	Conservative	Moderate Conservative	Moderate	Moderate	Moderate
	7-12 Years	Conservative	Moderate Conservative	Moderate	Moderate Aggressive	Moderate Aggressive
	12+ Years	Conservative	Moderate Conservative	Moderate	Moderate Aggressive	Aggressive

The results of this quiz are intended to help you identify what your optimal model may be. This quiz is not intended to offer investors a complete investment profile or to provide individual advice.

Asset Allocation Models

Conservative

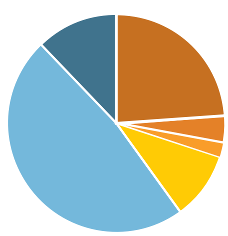
If you want to avoid a potential loss of account value, or if you are nearing retirement. The Conservative Model may have more stable and predictable returns than the other models. You should be willing to go without the potential for higher long-term returns.



- 13% - Large Cap
- 2% - Mid Cap
- 5% - Global/International
- 60% - Bonds
- 20% - Cash Equivalents

Moderate Conservative

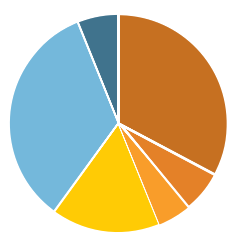
If your primary goal is to avoid short-term losses. However, you also want higher long-term returns to offset the effects of inflation. Your account will likely have relative stability, but in order to keep up with inflation, some fluctuations in your account value should be expected.



- 24% - Large Cap
- 4% - Mid Cap
- 2% - Small Cap
- 10% - Global/International
- 48% - Bonds
- 12% - Cash Equivalents

Moderate

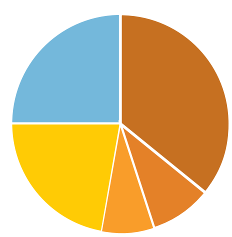
If you are interested in balancing your level of risk and return. You want to have returns in excess of inflation and an increase in your account value over the long term. When investing in this model, you should be willing to accept short-term losses and fluctuations in your account value.



- 33% - Large Cap
- 6% - Mid Cap
- 5% - Small Cap
- 16% - Global/International
- 34% - Bonds
- 6% - Cash Equivalents

Moderate Aggressive

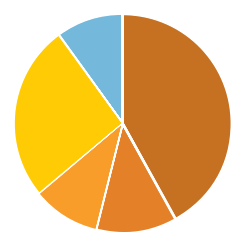
If you have more time until retirement and can tolerate higher-than-average fluctuations in your account value. This model provides the potential for higher-than-average returns over the long term. You should be willing to accept short-term losses and less stable returns.



- 36% - Large Cap
- 9% - Mid Cap
- 8% - Small Cap
- 22% - Global/International
- 25% - Bonds

Aggressive

If you are willing and able to stay the course through short-term gains and losses because you want the potential for higher returns over the long term. You should have a long time until retirement and a high tolerance for risk. You should be willing to accept frequent short-term losses and extreme fluctuations in account value.



- 42% - Large Cap
- 12% - Mid Cap
- 10% - Small Cap
- 26% - Global/International
- 10% - Bonds

Equity	Large Cap	Large Value, Large Blend, Large Growth
	Mid Cap	Mid Cap Value, Mid Cap Blend, Mid Cap Growth
	Small Cap	Small Value, Small Blend, Small Growth
	Global/International	Foreign Large Value, Foreign Large Blend, Foreign Large Growth, Foreign Small/Mid Growth, World Stock
Fixed Income	Bonds	Corporate Bond, Intermediate-Term Bond, Multisector Bond, Intermediate Core Bond
	Cash Equivalents	US Money Market, Fixed Account, Stable Value

Your path *To and Through Retirement®* begins here.

Talk to your financial professional to learn more or contact us at 800.888.2461.

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TO AND THROUGH RETIREMENT

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SFR Program Non-ERISA

Quarterly Performance Report as of March 31, 2022

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Quarterly Performance Results (as of 03/31/2022)

Morningstar Category / Fund	Inc.	Total Returns at Net Asset Value (NAV)* YTD	1-Year	3-Year	5-Year	10-Year	SI	Morningstar Ratings / Out of # of Funds Overall	3-Year	5-Year	10-Year	Expense Ratio Gross	Net	Expense Type	End Date
Money Market-Taxable															
JPMorgan US Gov Money Market - Morgan[1,4,5]	2/22/05	0.00%	0.00%	0.47%	0.70%	0.36%	1.01%	-	-	-	-	0.59%	0.59%	-	-
Guaranteed Group Annuity															
Fixed Account[2,3]	10/1/06	-	-	-	-	-	-	-	-	-	-	-	-	-	-

[1]7-day current yield as of 3-31-22: 0.00%

[2]April 1 – June 30, 2022 interest rate: 0.75%

Morningstar Category / Fund	Inc.	Total Returns at Net Asset Value (NAV)* YTD	1-Year	3-Year	5-Year	10-Year	SI	Morningstar Ratings / Out of # of Funds Overall	3-Year	5-Year	10-Year	Expense Ratio Gross	Net	Expense Type	End Date
Allocation--50% to 70% Equity															
Janus Henderson Balanced - A	7/6/09	-6.35%	7.81%	12.09%	11.59%	9.74%	10.36%	★★★★★ 660	★★★★ 660	★★★★★ 603	★★★★★ 435	0.89%	0.89%	-	-
Corporate Bond															
Invesco Corporate Bond - A	9/23/71	-7.72%	-4.85%	4.00%	3.77%	4.27%	6.85%	★★★★★ 191	★★★★★ 191	★★★★ 147	★★★★★ 92	0.74%	0.74%	-	-
Diversified Emerging Mkts															
Amer Funds New World - R4	10/7/02	-10.44%	-6.84%	9.53%	9.47%	6.75%	10.65%	★★★★★ 730	★★★★★ 730	★★★★★ 625	★★★★★ 352	0.92%	0.92%	-	-
BlackRock Emerging Markets - A	10/21/94	-13.40%	-19.33%	6.36%	8.06%	3.90%	4.94%	★★★★ 730	★★★★ 730	★★★★ 625	★★★ 352	1.29%	1.12%	C	6/30/23
Vanguard Emerging Mkt Index - Admiral[7]	6/23/06	-6.26%	-8.70%	5.60%	5.83%	3.32%	5.43%	★★★ 730	★★★ 730	★★★ 625	★★★ 352	0.14%	0.14%	-	-
Foreign Large Blend															
Vanguard Developed Mkt Index - Admiral[7]	8/17/99	-6.05%	0.70%	8.54%	7.16%	6.67%	4.55%	★★★★ 705	★★★★ 705	★★★★ 610	★★★★ 407	0.07%	0.07%	-	-
Foreign Large Growth															
Amer Funds EuroPacific Growth - R4	6/7/02	-12.32%	-9.67%	7.98%	7.63%	6.95%	7.43%	★★★ 389	★★ 389	★★ 339	★★★ 224	0.81%	0.81%	-	-
Foreign Large Value															
PIMCO RAE Global ex-US - A	6/5/15	-2.80%	-1.18%	5.73%	4.70%	-	3.99%	★★★ 325	★★ 325	★★★ 289	-	1.47%	0.91%	C	10/31/22
High Yield Bond															
BlackRock High Yield Bond - Service	11/19/98	-4.04%	0.33%	4.67%	4.58%	5.59%	6.63%	★★★★ 633	★★★★ 633	★★★★ 567	★★★★ 375	0.88%	0.87%	C	6/30/23
Pax High Yield Bond - Investor	10/8/99	-4.98%	-2.11%	4.11%	3.79%	4.22%	5.14%	★★★ 633	★★★ 633	★★★ 567	★★ 375	0.96%	0.96%	-	-
PIMCO High Yield Spectrum - A	9/15/10	-4.19%	-0.93%	4.14%	4.24%	5.52%	6.04%	★★★★ 633	★★★ 633	★★★ 567	★★★★ 375	0.97%	0.97%	-	-
Inflation-Protected Bond															
American Funds Inflation Linked Bond - R4	1/23/15	-2.47%	3.18%	6.35%	4.38%	-	3.42%	★★★★ 203	★★★★ 203	★★★★ 184	-	0.64%	0.64%	-	-
Intermediate Core Bond															
Vanguard Total Bond Mkt Index - Admiral[7]	11/12/01	-5.99%	-4.09%	1.69%	2.12%	2.20%	3.71%	★★★ 391	★★★ 391	★★★ 356	★★★ 256	0.05%	0.05%	-	-
Intermediate Core-Plus Bond															
Guggenheim Total Return Bond - A	11/30/11	-6.57%	-3.34%	3.28%	3.23%	4.31%	4.56%	★★★★★ 569	★★★★★ 569	★★★★ 502	★★★★★ 356	0.84%	0.79%	C	2/1/23
Pioneer Bond - A	10/31/78	-6.03%	-3.70%	2.58%	2.63%	3.05%	6.75%	★★★★ 569	★★★ 569	★★★ 502	★★★★ 356	0.82%	0.82%	-	-
Large Blend															
American Century Sustainable Equity - A	11/30/04	-7.07%	13.31%	18.63%	16.32%	13.77%	10.90%	★★★★ 1,232	★★★★ 1,232	★★★★★ 1,116	★★★ 818	1.04%	1.04%	-	-
BNY Mellon S&P 500 Index	1/2/90	-4.71%	15.08%	18.34%	15.42%	14.07%	9.93%	★★★★ 1,232	★★★★ 1,232	★★★★ 1,116	★★★★ 818	0.51%	0.50%	V	-
Pioneer - Y	5/6/99	-3.16%	16.61%	22.04%	18.03%	14.79%	7.91%	★★★★★ 1,232	★★★★★ 1,232	★★★★★ 1,116	★★★★★ 818	0.83%	0.61%	C	5/1/22
Vanguard 500 Index - Admiral[7]	11/13/00	-4.61%	15.60%	18.89%	15.95%	14.60%	7.87%	★★★★★ 1,232	★★★★ 1,232	★★★★ 1,116	★★★★★ 818	0.04%	0.04%	-	-

Morningstar measures risk adjusted returns. The overall rating is a weighted average based on a fund's 3, 5, and 10 year star rating.

Quarterly Performance Results (as of 03/31/2022)

Morningstar Category / Fund	Inc.	Total Returns at Net Asset Value (NAV)* YTD	1-Year	3-Year	5-Year	10-Year	SI	Morningstar Ratings / Out of # of Funds Overall	3-Year	5-Year	10-Year	Expense Ratio Gross	Net	Expense Type	End Date
Large Growth															
American Century Focused Dynamic Growth - A	5/31/06	-10.75%	-4.44%	22.72%	23.07%	16.96%	11.70%	★★★★ 1,124	★★★★ 1,124	★★★★★ 1,025	★★★★ 765	1.10%	1.10%	-	-
JPMorgan Large Cap Growth - R3[6]	9/9/16	-10.33%	5.71%	24.25%	23.09%	16.58%	23.52%	★★★★★ 1,124	★★★★★ 1,124	★★★★★ 1,025	★★★★ 765	1.02%	0.94%	C	10/31/22
TRP Growth Stock - R	9/30/02	-15.15%	-1.08%	15.76%	16.19%	14.58%	11.89%	★★★ 1,124	★★ 1,124	★★ 1,025	★★★ 765	1.17%	1.17%	-	-
Large Value															
American Century Disciplined Core Value - A	12/15/97	-1.25%	9.60%	14.38%	12.19%	11.96%	7.27%	★★★★ 1,146	★★★★ 1,146	★★★★ 1,047	★★★★ 770	0.91%	0.91%	-	-
Mid-Cap Blend															
BNY Mellon Midcap Index - Investor	6/19/91	-4.99%	4.10%	13.59%	10.57%	11.68%	11.63%	★★★ 360	★★★ 360	★★★ 318	★★★ 209	0.51%	0.50%	V	-
ClearBridge Mid Cap - A	9/1/98	-9.97%	4.26%	15.21%	10.95%	11.44%	10.20%	★★★ 360	★★★★ 360	★★★ 318	★★★ 209	1.13%	1.13%	-	-
Vanguard Mid Cap Index - Admiral[7]	11/12/01	-6.32%	8.82%	15.67%	13.00%	12.94%	10.69%	★★★★★ 360	★★★★★ 360	★★★★ 318	★★★★★ 209	0.05%	0.05%	-	-
Mid-Cap Growth															
Janus Hend Enterprise - S	7/6/09	-7.02%	3.74%	14.24%	15.32%	14.14%	16.23%	★★★★ 542	★★★ 542	★★★★ 503	★★★★★ 386	1.16%	1.16%	-	-
JPMorgan Mid Cap Growth - R3[6]	9/9/16	-11.87%	-3.84%	18.18%	17.64%	14.45%	17.78%	★★★★★ 542	★★★★ 542	★★★★★ 503	★★★★ 386	1.24%	1.20%	C	10/31/22
Mid-Cap Value															
Allspring Sp MdCp Val - A	7/31/07	-2.36%	12.72%	14.51%	10.38%	12.55%	9.40%	★★★★ 390	★★★ 390	★★★★ 354	★★★★★ 263	1.13%	1.13%	-	-
Nuance Mid Cap Value - Investor	12/31/13	0.51%	6.24%	10.76%	9.81%	-	9.90%	★★★★★ 390	★★★★ 390	★★★★★ 354	-	1.24%	1.19%	C	8/28/22
Multisector Bond															
Allspring Income Plus - A	1/31/13	-3.74%	-1.80%	3.75%	3.63%	-	2.47%	★★★★ 282	★★★★ 282	★★★★ 241	-	1.09%	0.92%	C	1/31/23
PIMCO Income - A	3/30/07	-4.30%	-1.93%	2.52%	3.18%	5.55%	6.81%	★★★★ 282	★★★ 282	★★★ 241	★★★★★ 137	1.02%	1.02%	-	-
Natural Resources															
BNY Mellon Natural Resources - A	10/31/03	34.53%	60.79%	27.59%	16.36%	9.25%	10.48%	★★★★ 107	★★★★★ 107	★★★★ 100	★★★ 88	1.20%	1.20%	-	-
Nontraditional Bond															
Guggenheim Macro Opportunities - A	11/30/11	-3.27%	-1.44%	3.57%	2.87%	4.22%	4.62%	★★★★★ 297	★★★★ 297	★★★★ 261	★★★★★ 119	1.47%	1.41%	C	2/1/23
Real Estate															
Baron Real Estate - Retail	12/31/09	-10.79%	-0.33%	24.45%	16.78%	14.86%	15.57%	★★★★★ 236	★★★★★ 236	★★★★★ 205	★★★★★ 149	1.34%	1.34%	-	-
Vanguard Real Estate Index - Admiral[7]	11/12/01	-5.97%	21.45%	11.44%	9.67%	9.70%	10.66%	★★★ 236	★★★ 236	★★★ 205	★★★ 149	0.12%	0.12%	-	-
Small Blend															
Invesco Main Street Small Cap - A	5/17/13	-5.84%	1.36%	15.58%	10.98%	-	10.86%	★★★★ 600	★★★★★ 600	★★★★ 541	-	1.23%	1.20%	C	4/30/22
PIMCO StocksPLUS Small Fund - A	7/31/06	-8.97%	-8.04%	10.55%	9.00%	11.52%	11.06%	★★★ 600	★★ 600	★★ 541	★★★ 358	1.10%	1.10%	-	-
Vanguard Small Cap Index - Admiral[7]	11/13/00	-5.74%	0.68%	13.16%	11.34%	12.11%	9.62%	★★★★★ 600	★★★★ 600	★★★★ 541	★★★★★ 358	0.05%	0.05%	-	-
Small Growth															
Allspring Fundamental Small Cap Growth - A	6/5/95	-18.71%	-17.57%	13.28%	14.66%	11.93%	9.88%	★★ 580	★★ 580	★★★ 521	★★ 391	1.47%	1.23%	C	7/31/22
Invesco Discovery - A	9/11/86	-16.06%	-6.13%	18.69%	17.91%	14.42%	11.26%	★★★★★ 580	★★★★★ 580	★★★★★ 521	★★★★★ 391	1.01%	1.01%	-	-
TRP QM US Small Cap Growth Eq - Advisor[6]	7/5/16	-11.71%	-5.91%	10.95%	11.17%	12.23%	12.82%	★★★ 580	★★★ 580	★★★ 521	★★★★ 391	1.10%	1.10%	-	-
Small Value															
Allspring Sp SmCp Val - A	5/7/93	-4.13%	2.56%	11.81%	8.68%	10.85%	11.10%	★★★★ 415	★★★ 415	★★★★ 395	★★★★ 300	1.28%	1.28%	-	-
Amer Beacon Small Cap Value - A	5/17/10	-0.90%	5.85%	12.83%	7.74%	10.12%	10.16%	★★★ 415	★★★ 415	★★ 395	★★★ 300	1.27%	1.27%	-	-
PIMCO RAE US Small - A	6/5/15	4.74%	16.04%	18.80%	12.43%	-	10.98%	★★★★ 415	★★★★★ 415	★★★★ 395	-	0.93%	0.92%	C	10/31/22

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Quarterly Performance Results (as of 03/31/2022)

Morningstar Category / Fund	Inc.	Total Returns at Net Asset Value (NAV)* YTD	1-Year	3-Year	5-Year	10-Year	SI	Morningstar Ratings / Out of # of Funds Overall	3-Year	5-Year	10-Year	Expense Ratio Gross	Net	Expense Type	End Date
Target-Date 2000-2010															
TRP Retirement 2010 - Advisor	10/31/03	-4.82%	1.11%	7.65%	6.65%	6.28%	6.32%	★★★★ 115	★★★★ 115	★★★★ 78	★★★★ 53	0.74%	0.74%	-	-
Target-Date 2015															
TRP Retirement 2015 - Advisor	5/31/07	-4.98%	1.36%	8.21%	7.23%	7.01%	5.42%	★★★★★ 117	★★★★ 117	★★★★ 89	★★★★★ 45	0.76%	0.76%	-	-
Vanguard Target Retire 2015 - Investor[7]	10/27/03	-4.79%	0.39%	6.20%	5.95%	6.20%	6.07%	★★★ 117	★★ 117	★★ 89	★★★ 45	0.08%	0.08%	-	-
Target-Date 2020															
TRP Retirement 2020 - Advisor	10/31/03	-5.14%	1.61%	8.91%	7.96%	7.78%	7.26%	★★★★★ 159	★★★★ 159	★★★★★ 127	★★★★★ 64	0.78%	0.78%	-	-
Vanguard Target Retire 2020 - Investor[7]	6/7/06	-5.06%	1.39%	7.87%	7.27%	7.31%	6.47%	★★★★ 159	★★★ 159	★★★ 127	★★★★ 64	0.08%	0.08%	-	-
Target-Date 2025															
TRP Retirement 2025 - Advisor	5/31/07	-5.57%	1.85%	9.86%	8.79%	8.55%	6.14%	★★★★★ 202	★★★★ 202	★★★★ 168	★★★★★ 88	0.80%	0.80%	-	-
Vanguard Target Retire 2025 - Investor[7]	10/27/03	-5.51%	1.86%	8.92%	8.14%	8.04%	7.04%	★★★★ 202	★★★ 202	★★★ 168	★★★★ 88	0.08%	0.08%	-	-
Target-Date 2030															
TRP Retirement 2030 - Advisor	10/31/03	-6.04%	2.18%	10.79%	9.57%	9.24%	8.14%	★★★★★ 201	★★★★ 201	★★★★ 168	★★★★★ 93	0.83%	0.83%	-	-
Vanguard Target Retire 2030 - Investor[7]	6/7/06	-5.65%	2.53%	9.84%	8.85%	8.68%	7.12%	★★★★ 201	★★★ 201	★★★ 168	★★★★ 93	0.08%	0.08%	-	-
Target-Date 2035															
TRP Retirement 2035 - Advisor	5/31/07	-6.43%	2.46%	11.62%	10.23%	9.78%	6.78%	★★★★ 199	★★★ 199	★★★★ 165	★★★★ 85	0.84%	0.84%	-	-
Vanguard Target Retire 2035 - Investor[7]	10/27/03	-5.66%	3.29%	10.77%	9.57%	9.31%	7.84%	★★★★ 199	★★★ 199	★★★ 165	★★★★ 85	0.08%	0.08%	-	-
Target-Date 2040															
TRP Retirement 2040 - Advisor	10/31/03	-6.76%	2.63%	12.35%	10.81%	10.20%	8.61%	★★★★ 201	★★★ 201	★★★★ 168	★★★★ 93	0.85%	0.85%	-	-
Vanguard Target Retire 2040 - Investor[7]	6/7/06	-5.66%	4.10%	11.68%	10.28%	9.85%	7.78%	★★★★ 201	★★★ 201	★★★ 168	★★★★ 93	0.08%	0.08%	-	-
Target-Date 2045															
TRP Retirement 2045 - Advisor	5/31/07	-6.84%	2.92%	12.85%	11.16%	10.40%	7.20%	★★★★ 199	★★★ 199	★★★★ 165	★★★★ 84	0.87%	0.87%	-	-
Vanguard Target Retire 2045 - Investor[7]	10/27/03	-5.67%	4.88%	12.61%	10.89%	10.19%	8.49%	★★★★ 199	★★★ 199	★★★ 165	★★★★ 84	0.08%	0.08%	-	-
Target-Date 2050															
TRP Retirement 2050 - Advisor	12/29/06	-6.91%	2.94%	12.88%	11.17%	10.40%	7.62%	★★★★ 201	★★★ 201	★★★★ 168	★★★★ 89	0.88%	0.88%	-	-
Vanguard Target Retire 2050 - Investor[7]	6/7/06	-5.65%	5.07%	12.74%	10.96%	10.23%	8.04%	★★★★ 201	★★★ 201	★★★★ 168	★★★★ 89	0.08%	0.08%	-	-
Target-Date 2055															
TRP Retirement 2055 - Advisor	5/31/07	-6.86%	2.97%	12.85%	11.14%	10.39%	7.18%	★★★★ 199	★★★ 199	★★★★ 163	★★★★ 69	0.89%	0.89%	-	-
Vanguard Target Retire 2055 - Investor[7]	8/7/10	-5.69%	5.05%	12.71%	10.95%	10.21%	10.84%	★★★★ 199	★★★ 199	★★★★ 163	★★★★ 69	0.08%	0.08%	-	-
Target-Date 2060+															
TRP Retirement 2060 - Advisor	6/23/14	-6.88%	2.95%	12.84%	11.13%	-	8.96%	★★★★ 188	★★★ 188	★★★★ 141	-	0.89%	0.89%	-	-
Vanguard Target Retire 2060 - Investor[7]	1/19/12	-5.68%	5.05%	12.71%	10.95%	10.24%	10.69%	★★★ 188	★★★ 188	★★★ 141	-	0.08%	0.08%	-	-
Vanguard Target Retire 2065 - Investor[7]	7/12/17	-5.63%	5.12%	12.69%	-	-	10.56%	-	-	-	-	0.08%	0.08%	-	-
Target-Date Retirement															
Vanguard Target Retire Income - Investor[7]	10/27/03	-4.77%	0.15%	5.75%	5.30%	4.95%	5.26%	★★★★ 148	★★★ 148	★★★★ 122	★★★★ 77	0.08%	0.08%	-	-

Morningstar measures risk adjusted returns. The overall rating is a weighted average based on a fund's 3, 5, and 10 year star rating.

Quarterly Performance Results (as of 03/31/2022)

Morningstar Category / Fund	Inc.	YTD	1-Year	3-Year	5-Year	10-Year	SI	Overall		3-Year		5-Year		10-Year		Gross	Net	Type	End Date
		Total Returns at Net Asset Value (NAV)*						Morningstar Ratings / Out of # of Funds								Expense Ratio		Expense	
World Allocation																			
Loomis Sayles Glb Allocation - A	2/1/06	-10.60%	0.66%	9.94%	10.10%	8.43%	8.03%	★★★★★	407	★★★★	407	★★★★★	361	★★★★★	251	1.12%	1.12%	-	-
Virtus AllianzGI Global Allocation - A	9/30/98	-6.74%	2.35%	8.72%	7.12%	5.99%	5.86%	★★★★	407	★★★★	407	★★★★	361	★★★	251	1.42%	0.72%	C	1/31/23
World Bond-USD Hedged																			
Vanguard Total Intl Bond Index - Admiral[7]	5/31/13	-5.01%	-4.92%	0.53%	2.00%	-	2.74%	★★★	112	★★	112	★★★	84	-		0.11%	0.11%	-	-
World Large-Stock Blend																			
Victory RS Global - A	5/16/11	-6.84%	9.34%	15.72%	13.74%	12.28%	11.18%	★★★★★	279	★★★★★	279	★★★★★	247	★★★★★	146	1.22%	0.87%	C	4/30/22
World Large-Stock Growth																			
TRP Global Stock - Advisor	4/28/06	-10.90%	-5.13%	19.09%	17.90%	14.72%	9.20%	★★★★★	306	★★★★★	306	★★★★★	265	★★★★★	167	1.06%	1.06%	-	-
World Small/Mid Stock																			
Invesco Glbl Opportunities - A	10/22/90	-20.38%	-20.95%	7.67%	8.44%	10.99%	11.40%	★★★	139	★★	139	★★	118	★★★	71	1.04%	1.04%	-	-

***The average annual total return figures assume a one-time investment of $1,000 at the beginning of each period. All dividends are assumed to be reinvested. NAV performance returns do not reflect deduction of any front-end sales loads or contingent deferred sales loads that may be imposed by the funds. Such loads are waived by the funds for purchases made through this Program. If you purchase these funds outside of this Program, you may be subject to these charges. If the sales loads were reflected in the accompanying performance data, it would reduce the quoted performance. In addition, the NAV performance numbers do not reflect deduction of any Trust/Custodial Account charges, which would reduce the quoted performance. Because this performance information does not reflect deduction of Trust/Custodial Account charges, the quoted performance is higher than the performance experienced by your Trust/Custodial Account.**

Morningstar measures risk adjusted returns. The overall rating is a weighted average based on a fund's 3, 5, and 10 year star rating.

3 The Guaranteed Group Annuity (also referred to as the Fixed Account Option) is a group unallocated fixed annuity contract issued by Security Benefit Life Insurance Company ("SBL"), policy form GV4586. The obligations under the Fixed Account option are guaranteed by SBL's General Account in the event that the assets are not sufficient to meet the Fixed Account obligations. The Guaranteed Minimum Interest Rate for the Fixed Account Option is 0.25% for 2022.

4 The current yield more closely reflects the current earnings of the fund than the total return.

5 **You could lose money by investing in the Fund. Although the Fund seeks to preserve the value of your investment at $1.00 per share, it cannot guarantee it will do so. An investment in the Fund is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. The Fund's sponsor has no legal obligation to provide financial support to the Fund, and you should not expect that the sponsor will provide financial support to the Fund at any time.**

6 This fund uses extended performance, which generally means that the fund manager calculates performance for the share class of the fund listed based upon on performance of a previous share class. Thus, older performance may have been higher or lower if the share class listed was in existence during such time periods. For specific periods using extended performance please consult the fund's prospectus.

7 Account Charges – An additional asset based fee of 0.45% applies to assets held in the Vanguard Funds.

C **-** The difference between the gross expense ratio and the net expense ratio represents a contractual waiver of fees. A contractual waiver is generally provided for a specified period of time.

V **-** The difference between the gross expense ratio and the net expense ratio represents a voluntary waiver of fees. Unlike a contractual waiver, a voluntary waiver is not provided for a specified period of time and may end without notice. Refer to the fund's prospectus for details about this voluntary waiver.

Triple-digit or high double-digit performance is attributable, in part, to unusually favorable market conditions and may not be repeated or consistently achieved in the future. Recent market volatility may affect performance so that current performance may be lower. Performance, especially for short time periods, should not be the sole factor in making your investment decisions.

The Fixed Account and JPMorgan U.S. Government Money Market may not be available in all plans. Contact your financial representative or employer for details.

The following fund is not available in 401(k), 403(b) ERISA or 457 Tax Exempt retirement plans:
Guggenheim Total Return Bond

Janus Henderson Enterprise is not available to plans established after January 27, 2017.

The SFR Program is offered through Security Distributors. The SFR 401(k) and 401(a) Programs are Trust Accounts under §401 of the Internal Revenue Code. The SFR 403(b)(7) ERISA and 403(b)(7) Voluntary Programs are Custodial Accounts under §403(b)(7) of the Internal Revenue Code. The SFR 457 Governmental Program and the SFR 457 Tax Exempt Program are Trust Accounts under §457(g) of the Internal Revenue Code.

Account Charges - Options 1, 2, 12, 13, 14, 30, 31, 32, 33, 34, 43 and 46: Asset Based Account Fee: 1.00%. Options 3, 4, 5, 15, 16, 17, 35, 44 and 47: Asset Based Account Fee: 0.85%. Options 6, 7, 18, 19, 20, 36, 45 and 49: Asset Based Account Fee: 0.75%. Options 8, 9, 21, 22, and 23: Asset Based Account Fee: 0.65%. Options 10, 11, 24, 25 and 26: Asset Based Account Fee: 0.50%. Options 27, 28 and 29: Asset Based Account Fee: 0.35%. Administration fees of $0 to $40 may apply. (A Contingent Deferred Sales Charge may apply. Please contact your financial representative for details). There is an additional asset based fee of 0.10% for assets held in the American Funds and Pioneer.

Broker Compensation
Security Distributors pays commissions to the selling broker/dealer in connection with contributions to your custodial account. Security Distributors may use any of its corporate assets to pay such commissions and other distribution costs. A portion of any payments made to the selling broker/dealer may be passed on to the registered representative in accordance with the broker/dealer's internal compensation programs. Security Distributors pays commissions that range in amount from 0.00% to 5.00% as a percentage of initial and subsequent contributions at the time it receives them. Security Distributors also pays asset-based commissions that range from an annual percentage of 0.10% to 0.80% of average account value. The commission amount generally varies according to the custodial account fee option selected. Please ask your registered representative for further information about what he or she and the selling broker/dealer for whom he or she works may receive in connection with your contributions to the custodial account.

Administrative, Marketing, and Support Service Payments
Security Distributors (and its affiliates) may receive payments from the underlying funds, their advisers, sub-advisers, and distributors, or affiliates thereof, in consideration for distribution, administrative, marketing, and other services Security Distributors (or its affiliates) provides. Security Distributors negotiates these payments, which may differ by underlying fund (sometimes substantially), and the amounts Security Distributors (or its affiliates) receive may be significant. Making these payments may provide an adviser, sub-adviser, or distributor (or affiliate thereof) with increased access to the Security Distributors and its affiliates. Security Distributors and its affiliates anticipate they will receive payments from the underlying funds, their advisers, sub-advisers, and distributors, or affiliates thereof in the form of 12b-1 fees, investor services fees and administrative payments that range in total from 0.25% to a maximum of 0.65% of the average net assets of the account invested in the underlying fund on an annual basis. This does not include the arrangements with certain of the investment advisers, sub-advisers, or distributors (or affiliates thereof) of certain of the Underlying Funds in which the payment is not based on the average net assets of the accounts invested in the underlying fund.

Morningstar Rating™

Often simply called the Star Rating, the Morningstar Rating brings load-adjustments, performance (returns) and risk together into one evaluation. To determine a fund's star rating for a given time period (three, five, or ten years), the fund's risk-adjusted return is plotted on a bell curve: If the fund scores in the top 10% of its category, it receives 5 stars (Highest); if it falls in the next 22.5% it receives 4 stars (Above Average); a place in the middle 35% earns 3 stars (Average); those lower still, in the next 22.5%, receive 2 stars (Below Average); and the bottom 10% get only 1 star (Lowest). The Overall Morningstar Rating is a weighted average of the available three-, five-, and ten-year ratings.

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Each of the Morningstar Category Indexes is unmanaged and cannot be invested in directly. Although index returns were gathered from reliable sources, Morningstar Investment Management cannot guarantee their accuracy or completeness.

Security Distributors

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TO AND THROUGH RETIREMENT

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Date Last Revised: 09/30/2021

FACTS	WHAT DOES SECURITY BENEFIT DO WITH YOUR PERSONAL INFORMATION?

Why?	Financial companies, including insurance companies and related insurance entities, choose how they share your personal information. Federal and state law gives consumers the right to limit some but not all sharing. These laws also require us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: • Social Security number • account transactions • financial and health information • claims and payment information When you are *no longer* our customer, we continue to share your information as described in this notice.
How?	All insurance companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons insurance companies can share their customers' personal information, the reasons we may choose to share, and whether you can limit this sharing.

Reasons we can share your personal information	**Does Security Benefit share?**	**Can you limit this sharing?**
For our everyday business purposes — Such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes — to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	No
For our affiliates' everyday business purposes — information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes — information about your creditworthiness	No	Yes, see "To limit our sharing" below
For our affiliates to market to you	Yes	Yes, see "To limit our sharing" below
For nonaffiliates to market to you	Yes	Yes, see "To limit our sharing" below

To limit our sharing	To advise us of your preferences regarding our sharing your personal information with our affiliates and/or our non-affiliates you can: • Call **1.800.888.2461** — our representatives will assist you with your choice. Please have your account information available when you call. • Go to **www.SecurityBenefit.com** If you have already told us your choice of "No", we have it on file. Unless you are changing your choice back to "Yes", you will not need to tell us again. **Please note:** If you are a new customer, we can begin sharing your personal information 30 days from the date we sent this notice. However, you can contact us at any time to limit this sharing.
Questions?	• Call **1.800.888.2461** • Go to **www.SecurityBenefit.com** • Email us at: **privacy.inquiry@securitybenefit.com**

Who we are	
Who is providing this notice?	Security Benefit (Security Benefit Life Insurance Company, Security Distributors, LLC, First Security Benefit Life Insurance and Annuity Company of New York, and Security Financial Resources, Inc.)
What we do	
How does Security Benefit protect my personal information?	• We work to keep your information correct and safe. We design our business systems to properly gather, store, and process your personal information. We also work to make your personal information safe through the use of technology and business practices. • Only our agents, employees, and those we share your personal information with as disclosed in this notice are authorized to access your personal information. Our policies help make sure that our employees and agents protect your personal information. Our employees and agents who break these policies and practices are dealt with appropriately.
How does Security Benefit collect my personal information?	We collect your personal information by some of the ways listed below: • information provided by you (including names, addresses, and financial information) • information about your business with us or our agents (including claims and payment information) • information from or about your transactions with third parties (including insurance application histories, health history, and salary information) • information from consumer reporting agencies
Why can't I limit all sharing?	Federal laws give you the right to limit: • sharing for affiliates' everyday business purposes—information about your creditworthines • affiliates from using your personal information to market to you • sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See *Other Important Information* below.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies, including financial service providers such as insurance companies and insurance-related entities, and non-financial companies such as technology, real estate, sports and media, and consumer-experience companies. For example, our affiliates include, but are not limited to, First Security Benefit Life Insurance and Annuity Company of New York.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. For example, companies seeking to market their services to you.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

Other important information

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Arizona, California, Maine, Massachusetts, Minnesota, Montana, New Jersey, New Mexico, North Carolina, North Dakota, Ohio, Oregon, and Virginia. We will not share your personal information with non-affiliated third parties (or, in some circumstances, our affiliates) other than our agents or service providers unless you authorize us to share it or the law otherwise permits us to share it. You have the right to authorize or not authorize this sharing of personal information.

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- The right to know the categories, sources and specific pieces of personal information we have collected about you in the past 12 months, including our purpose for collecting the information and the categories of third parties with whom we share that personal information, subject to certain exceptions.
- The right to delete some or all of the personal information we collect, subject to certain exceptions and
- The right to opt-out of our sale of your personal information, if we sell your personal information

CCPA rights are limited and do not apply to any of the NPI (described on Page 1) that we have collected from you and about you in connection with providing you an insurance or financial product or service.

The personal information we collect that is subject to the CCPA includes some of your internet and network activity (such as your browsing history, Internet Protocol address and interactions with our website) and inferences drawn about you from this information, such as your preferences, aptitudes and abilities. We may share this information with our service providers for a business purpose. We do not sell personal information about current or former customers to any third parties. We may allow third-party advertising cookies to be placed on your browser or mobile device when you visit our website. You may opt-out of third party cookies. To learn how to exercise your rights under the CCPA or if you wish to see a more detailed explanation of your rights, please visit our website at **www.SecurityBenefit.com** and click on "Privacy" on the home page or email us at: **privacy.inquiry@securitybenefit.com.**

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