

THREE STEPS TO PREPARE NEW CLEARLINE BUSINESS FOR SUBMISSION

1

Request an SBG IAR # with GWN:

Send a one-time email to Modelupdates@gwnsecurities.com & Newbusiness@gwnsecurities.com requesting your IAR number. **(IAR number must be entered on the ClearLine Investment Advisor Authorization form)**

2

Complete these Security Benefit requirements:

An advisor must first be appointed with Security Benefit. Once appointed, the advisor will complete the required Security Benefit training on the ClearLine plan.

3

Paperwork must be submitted to and approved by GWN New Business.

Please submit the following forms for approval:

GWN Forms:

The ClearLine Packet is available on our website and includes:

- Trusted Contact
- Client Account Form
- Annuity (FIA/EIA/ Fixed) Disclosure
- Discretionary Advisory Agreement Form

SECURITY BENEFIT Forms:

- ClearLine Fixed Annuity Fund Application
 - ClearLine Investment Advisor Authorization
- *(Please note, advisor must add there IAR# on the Security Benefit IAA form)**



Guidelines for SBG ClearLine Accounts:

- Transfers or exchanges from existing Security Benefit accounts can be converted four years after the initial purchase.
- **Investable Guidelines Chart:**

Risk Tolerance	Maximum % of Investable Assets in Annuities
Conservative	100%
Balanced	80%
Moderate	60%
Growth	40%
Aggressive	20%

- **Clients assets must already be invested in GWN Advisory Programs** (MAP, MAP NQ, American Funds Direct, SBG SAM/Choice, Total Access, FIWS Premier, Platinum and SAM) **for purpose of these calculations.**
- For **Conservative accounts**, 3 Fund Minimum required per account.