



## SFR Program Fund Replacements for Non-ERISA Plans

EFFECTIVE DATE: JANUARY 8, 2021

On Jan. 8, 2021, Security Benefit will implement the fund replacement process for non-ERISA plans and accounts within the SFR Program.

On this date, five funds will be added and six new funds will be removed. All the funds that are scheduled to be removed have failed one or more of the monitoring standards for six or more consecutive quarters. Additionally, the funds that are being removed will have their assets mapped to a similar fund on Jan. 8, 2021. Please see the Annual Fund Additions and Removal Fact Sheet for additional details on these changes.

All future investment allocations and automatic asset reallocations will be mapped to the appropriate designated fund on Jan. 8, 2021, as well.

Plan sponsors and participants will also receive written notice explaining these changes based on the following timeline:

Plan Sponsors – Nov. 9 – Letter and fact sheet will be mailed.

Participants – Dec. 8 – Letter and fact sheet will be mailed.

If you have any questions regarding this information, please contact your Regional Vice President at 800.747.5164, option 3.



2021 SFR Fund Lineup Changes: [Plan Sponsor Letter](#)

2021 SFR Fund Lineup Changes: [Participant Letter](#)

2021 SFR Annual Fund Additions and Removals: [Fact Sheet](#)



800.747.5164,  
option 3



8 a.m. - 7 p.m., M - F  
Eastern Time



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