

Fund changes effective August 1, 2024

Sammons Retirement Solutions® is committed to offering you and your clients the most competitive investment options available. We constantly monitor performance, expenses, fund flows, consistency, and various risk parameters. We compile that data and update our fund options annually. Additionally, each August, we update the LiveWell® Models powered by Morningstar Investment Management. Read on to find out what's changed effective August 1, 2024.

Fund Additions		
Fund name	Ticker	Asset class
Columbia Dividend Income R	CDIRX	US Fund Large Value
Columbia Small Cap Growth R	CCRIX	US Fund Small Growth
Eaton Vance Global Income Builder R	EDIRX	US Fund Global Allocation
Eaton Vance Income Fund of Boston R	ERIBX	US Fund High Yield Bond
Eaton Vance Small-Cap R	ERSGX	US Fund Small Growth
Fidelity Advisor Balanced M	FAIGX	US Fund Moderate Allocation
Fidelity Advisor Consumer Staples M	FDTGX	US Fund Consumer Defensive
Fidelity Advisor Equity Growth M	FAEGX	US Fund Large Growth
Fidelity Advisor Value Strategies M	FASPX	US Fund Mid-Cap Value
Janus Henderson Forty R	JDCRX	US Fund Large Growth
Putnam Core Bond Fund R	PTRKX	US Fund Intermediate Core Bond
Putnam Core Equity Fund R	PMYZX	US Fund Large Blend
Putnam Dynamic Asset Allocation Cnsv R	PACRX	US Fund Conservative Allocation
Putnam Dynamic Asset Allocation Gr R	PASRX	US Fund Moderately Aggressive Allocation
Putnam Emerging Markets Equity R	PEMLX	US Fund Diversified Emerging Mkts
Putnam Global Health Care R	PHSRX	US Fund Health
Putnam Large Cap Growth R	PGORX	US Fund Large Growth
Putnam Large Cap Value R	PEQRX	US Fund Large Value
Putnam Research R	PRSRX	US Fund Large Blend



New fund family!

Fund Soft Closures		
Fund name	Ticker	Asset class
abrdn Focused U.S. Small Cap Eq R	GLSRX	US Fund Small Growth
Columbia Emerging Markets R (liquidating 4/19)	CEMRX	US Fund Diversified Emerging Mkts
Federated Hermes Kaufmann R	KAUFX	US Fund Mid-Cap Growth
Fidelity Advisor Real Estate M	FHETX	US Fund Real Estate
Invesco SteelPath MLP Select 40 R	SPMWX	US Fund Energy Limited Partnership
Janus Henderson Flexible Bond R	JDFRX	US Fund Intermediate Core-Plus Bond
Lord Abbett Fundamental Equity R3	LAVRX	US Fund Large Value
MassMutual Equity Opportunities R3	MFVNX	US Fund Large Blend
Pioneer Equity Income	PQIRX	US Fund Large Value
Principal Core Fixed Income R3	PIOOX	US Fund Intermediate Core Bond

Current investors will not be impacted, but no new purchases are allowed into these soft-closed funds. If clients transfer out of the fund, they cannot transfer back in.

For more information, contact the Sammons Retirement Solutions® Sales Desk.



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Investment option additions	
Investment option name	Asset class
American Century VP Capital Apprec II	US Insurance Mid-Cap Growth
Fidelity VIP Value Strategies Service 2	US Insurance Mid-Cap Value
Janus Henderson VIT Forty Svc	US Fund Large Growth
PIMCO VIT StocksPLUS® Global Port Adv	US Insurance Global Large-Stock Blend
Putnam VT Core Equity IB	US Insurance Large Blend
Putnam VT Emerging Markets Equity Fd IB	US Insurance Diversified Emerging Mkts
Putnam VT Focused Intl Eq IB	US Insurance Foreign Large Blend
Putnam VT George Putnam Balanced IB	US Insurance Moderate Allocation
Putnam VT Global Asset Allocation IB	US Insurance Moderate Allocation
Putnam VT Global Health Care IB	US Insurance Health
Putnam VT High Yield IB	US Insurance High Yield Bond
Putnam VT International Equity IB	US Insurance Foreign Large Blend
Putnam VT International Value IB	US Insurance Foreign Large Value
Putnam VT Large Cap Growth IB	US Insurance Large Growth
Putnam VT Large Cap Value IB	US Insurance Large Value
Putnam VT Research IB	US Insurance Large Blend
Putnam VT Small Cap Growth IB	US Insurance Small Growth
Putnam VT Small Cap Value IB	US Insurance Small Value



New fund family!

Investment option soft closures	
Investment option name	Asset class
ALPS Global Opportunity III	US Fund Global Small/Mid Stock
Columbia VP Emerging Markets 2	US Insurance Diversified Emerging Mkts
DWS High Income VIP B (liquidating 6/17)	US Insurance High Yield Bond
Federated Hermes Kaufmann II S	US Insurance Mid-Cap Growth
Janus Henderson VIT Flexible Bond Svc	US Fund Intermediate Core-Plus Bond
Lord Abbett Series Fundamental Eq VC	US Insurance Large Value
Pioneer Equity Income VCT II	US Insurance Large Value

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Investing in variable annuities involves risk, including potential loss of investment. You and your client should consider the investment objectives, risks, charges, and expenses of the variable annuity and its underlying investment options carefully before investing. The prospectus and/or summary prospectus contain this and other information. You or your client can visit srslivewell.com/prospectus, or call 866-747-3421 to obtain a current prospectus for the variable annuity and its underlying investment options. Inform investors to carefully read the prospectus before investing.

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