Reset Form

LiveWell Variable Annuity dollar cost averaging (DCA) program form

Mail to: P.O. Box 9261, Des Moines, IA 50306-9261
Overnight: 8300 Mills Civic Pkwy, West Des Moines, IA 50266-3833
Phone: 1-866-747-3421 | **Email:** SecuritiesPi@sfgmembers.com

Instructions

Use this form to establish, change, or cancel a Dollar Cost Averaging program.

Note: This program is not available if you have elected the automatic portfolio rebalancing program. The minimum Contract value to initiate a DCA program is $10,000. The minimum amount of set-up time for any DCA program is three (3) months. There is no maximum amount of set-up time.

Future contributions received without express written allocation instructions will be directed into the DCA target accounts.

1. Contract information

Please provide all requested information.

Contract number			
Owner's name (first, middle initial, last)			Social Security number
Joint Owner's name (first, middle initial, last) - if applicable			Social Security number
Non-Natural Owner - if applicable			Tax identification number/EIN
Street address			Apartment/Suite number
City	State	ZIP	Phone number

2. Dollar cost averaging instructions

For questions or assistance, please call the Service Center at 866-747-3421. Any investment option may be elected as the DCA source account, but the elected "source account" must have a minimum balance of $1,200. The minimum amount that may be transferred via DCA monthly is $100, quarterly is $300, semi-annually is $600, and annually is $1,200.

A. Please elect only one option:

- ☐ **Establish** a Dollar Cost Averaging program - complete remainder of this form.
- ☐ **Change** the existing Dollar Cost Averaging program - complete remainder of this form.
- ☐ **Cancel** the existing Dollar Cost Averaging program and DO NOT ADD a new program - move to signature section of this form.

B. Dollar Cost Averaging Instructions:

Dollar Cost Averaging will occur on the **Contract Anniversary** of the month according to the elected frequency, provided that it is a business day. Please consult the sales materials provided at purchase for details regarding this feature as well as restrictions, minimum or maximum limitations, fees, and other applicable information. Dollar Cost Averaging cannot be elected if you participate in automatic portfolio rebalancing.

I would like to dollar cost average $________________ or ☐ Equal proportion based on the frequency selected below from the following source account (select ONE account you want to DCA from): ____

☐ Monthly, for _________ months (3-month minimum) ☐ Quarterly, for _________ quarters

☐ Semi-Annually, for ________ semesters ☐ Annually, for ________ years or ☐ Until source account is depleted

Please elect the target account(s) (account(s) you want to DCA into) by selecting investment options on the following pages.

Dollar Cost Averaging does not assure a profit or protect against loss in a declining market. Such a plan involves continuous investment in securities regardless of fluctuating price levels of such securities. Investors should consider their financial ability to continue purchases through periods of low price levels.

3. Investment options

Please designate your allocations in whole percentages only. No matter which investment options are chosen, the total allocations must equal 100%, or the application will not be considered in good order.

LiveWell® Models

Accumulation	Percent
Conservative	_____ %
Moderate	_____ %
Moderate Growth	_____ %
Growth	_____ %
Aggressive Growth	_____ %

Income	Percent
High Income	_____ %
Diversified Income	_____ %

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The model portfolios will not automatically rebalance unless automatic portfolio rebalancing is elected.

Investment options	Percent
Large Value	
American Century VP Disciplined Core Value II	_____ %
American Century VP Value Fund II	_____ %
American Funds IS Washington Mutual Investors Fund Class 4	_____ %
BlackRock Basic Value V.I. Fund Class III	_____ %
BlackRock Equity Dividend V.I. Fund Class III	_____ %
Columbia Variable Portfolio Dividend Opportunity Class 2	_____ %
Columbia Variable Portfolio Select Large-Cap Value 2	_____ %
Invesco V.I. Diversified Dividend II	_____ %
Lord Abbett Series Fund Fundamental Equity Portfolio VC	_____ %
Pioneer Equity Income VCT Portfolio Class II	_____ %
Principal VC Equity Income 3	_____ %
T. Rowe Price Equity Income Port II	_____ %
Large Blend	
American Funds IS Growth-Income Fund Class 4	_____ %
ClearBridge Variable Dividend Strategy Portfolio Class II	_____ %
Columbia Variable Portfolio Contrarian Core Class 2	_____ %
DWS Equity 500 Index VIP Class B	_____ %
Franklin Rising Dividends VIP Fund Class 2	_____ %
Invesco V.I. Equally Weighted S&P 500 II	_____ %
Invesco V.I. Main Street II	_____ %
MFS VIT II Blended Research Core Equity Portfolio Service Class	_____ %
Pioneer VCT Portfolio Class II	_____ %
Large Growth	
Alger Capital Appreciation Portfolio Class S	_____ %
American Century VP Ultra Fund II	_____ %
American Funds IS Growth Fund Class 4	_____ %
BlackRock Large Cap Focus Growth V.I. Fund Class III	_____ %
ClearBridge Variable Large Cap Growth Portfolio Class II	_____ %
Fidelity VIP Contrafund Portfolio Service Class 2	_____ %
Fidelity VIP Growth Opportunities Portfolio Service Class 2	_____ %
Franklin DynaTech VIP Fund Class 2	_____ %

Investment options	Percent
Principal VC Blue Chip 3	_____ %
T. Rowe Price Blue Chip Growth II	_____ %
Mid Value	
AB VPS Small/Mid Cap Value Portfolio B	_____ %
American Century VP Mid Cap Value Fund II	_____ %
Columbia Variable Portfolio Select Mid Cap Value 2	_____ %
Janus Henderson VIT Mid Cap Value Portfolio Service Shares	_____ %
Mid Blend	
Calvert VP SRI Mid Cap Portfolio	_____ %
ClearBridge Variable Mid Cap Portfolio Class II	_____ %
Fidelity VIP Mid Cap Portfolio Service Class 2	_____ %
Mid Growth	
Federated Hermes Kaufmann II Svc	_____ %
Invesco V.I. Discovery Mid Cap Growth II	_____ %
Janus Henderson VIT Enterprise Service Shares	_____ %
T. Rowe Price Mid-Cap Growth Port II	_____ %
Small Value	
Columbia Variable Portfolio Small Cap Value 2	_____ %
Guggenheim VIF Small Cap Value Fund (Series Q)	_____ %
Royce Capital Fund – Small-Cap Portfolio Service Class	_____ %
Small Blend	
DWS Small Cap Index VIP Class B	_____ %
Invesco V.I. Main Street Small Cap II	_____ %
Invesco V.I. Small Cap Equity II	_____ %
Small Growth	
ClearBridge Variable Small Cap Growth Portfolio Class II	_____ %
MFS VIT New Discovery Portfolio Service Class	_____ %
International Large	
American Funds IS International Fund Class 4	_____ %
American Funds IS International Growth and Income Fund Class 4	_____ %
Fidelity VIP Intl Capital App Service Class 2	_____ %
Invesco Oppenheimer V.I. International Growth II	_____ %
Janus Henderson VIT Overseas Service Shares	_____ %
Lazard Retirement International Equity Portfolio Service Shares	_____%

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3. Investment options *(continued)*

Please designate your allocations in whole percentages only. No matter which investment options are chosen, the total allocations must equal 100%, or the application will not be considered in good order.

Investment options	Percent
MFS VIT II International Intrinsic Value Portfolio Service Class	_____%
Templeton Foreign VIP Fund Class 2	_____%
International Small	
American Funds IS Global Small Capitalization Fund Class 4	_____%
World Stock	
American Funds IS Capital World Growth and Income Fund Class 4	_____%
American Funds IS Global Growth Fund Class 4	_____%
Invesco V.I. Global II	_____%
Janus Henderson VIT Global Research Portfolio Service Shares	_____%
Emerging Markets	
American Funds IS New World Fund Class 4	_____%
Columbia Variable Portfolio Emerging Markets 2	_____%
Fidelity VIP Emerging Markets Portfolio Service Class 2	_____%
MFS VIT II Emerging Markets Equity Portfolio Service Class	_____%
Templeton Developing Markets VIP Fund Class 2	_____%
Commodities/Precious Metals	
PIMCO Commodity Real Return Strategy Portfolio Advisor Class	_____%
Energy/Natural Resources	
ALPS | Alerian Energy Infrastructure Portfolio Class III	_____%
Fidelity VIP Energy Service 2	_____ %
VanEck VIP Global Resources S	_____%
Financial	
JHVIT Financial Industries II	_____%
Health	
T. Rowe Price Health Sciences II	_____%
Real Estate	
Fidelity VIP Real Estate Portfolio Service Class 2	_____%
Franklin Global Real Estate VIP 2	_____%
MFS VIT III Global Real Estate Service	_____%
Technology	
Columbia Variable Portfolio Seligman Global Tech 2	_____%
Janus Henderson VIT Global Technology and Innovation Portfolio Service Shares	_____%
MFS VIT II Technology Portfolio Service Class	_____%

Investment options	Percent
Utilities	
MFS VIT Utilities Portfolio Service Class	_____%
Balanced	
American Century VP Balanced II	_____%
American Funds IS Asset Allocation Fund Class 4	_____%
Calvert VP SRI Balanced F	_____%
Franklin Income VIP Fund Class 2	_____%
Franklin VolSmart Allocation VIP 2	_____ %
Invesco V.I. Equity and Income II	_____%
Janus Henderson VIT Balanced Portfolio Service Shares	_____%
Principal VC Diversified Balanced 3	_____%
Principal VC Diversified Growth 3	_____%
Principal VC Diversified Income 3	_____%
Risk Based Allocation	
Fidelity VIP FundsManager 50% Portfolio Service Class 2	_____%
Fidelity VIP FundsManager 70% Portfolio Service Class 2	_____%
Fidelity VIP FundsManager 85% Portfolio Service Class 2	_____%
Global Allocation	
American Funds IS Capital Income Builder Class 4	_____%
American Funds IS Global Balanced 4	_____%
BlackRock Global Allocation V.I. Fund Class III	_____%
Invesco V.I. Balanced-Risk Allocation II	_____%
Lazard Retirement Global Dynamic Multi Asset Portfolio Service Shares	_____%
MFS VIT II Global Tactical Allocation Portfolio Service Class	_____%
Tactical	
ALPS Global Opportunity Portfolio Class III	_____%
BlackRock 60/40 Target Allocation ETF V.I. Fund Class III	_____%
DWS Alternative Asset Allocation VIP Portfolio Class B	_____%
Federated Hermes Managed Volatility II Svc	_____%
Guggenheim VIF Global Managed Futures Strategy Fund	_____%
Guggenheim VIF Long Short Equity Fund	_____%
Guggenheim VIF Multi-Hedge Strategies Fund	_____%
PIMCO All Asset Portfolio Advisor Class	_____%
PIMCO Global Managed Allocation Portfolio Advisor Class	_____%
Short-Term Bond	
Lord Abbett Series Short Duration Income Portfolio VC	_____%
PIMCO Low Duration Portfolio Advisor Class	_____%

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3. Investment options *(continued)*

Please designate your allocations in whole percentages only. No matter which investment options are chosen, the total allocations must equal 100%, or the application will not be considered in good order.

Investment options	Percent
Intermediate Bond	
American Funds IS The Bond Fd of Amer 4	_____%
Fidelity VIP Investment Grade Bd Svc 2	_____%
Invesco V.I. Core Plus Bond II	_____%
Janus Henderson VIT Flexible Bond Portfolio Service Shares	_____%
JHVIT Select Bond II	_____%
MFS VIT II Corporate Bond Portfolio Service Class	_____%
PIMCO Total Return Portfolio Advisor Class	_____%
Pioneer Bond VCT Portfolio Class II	_____%
Western Asset Variable Core Bond Plus Portfolio Class II	_____%
Multisector Bond	
Fidelity VIP Strategic Income Portfolio Service Class 2	_____%
JHVIT Strategic Income Opportunities II	_____%
Lord Abbett Series Fund Bond Debenture Portfolio VC	_____%
PIMCO Income Portfolio Advisor Class	_____%
World Bond	
Columbia Variable Portfolio Emerging Markets Bond Class 2	_____%
PIMCO Emerging Markets Bond Portfolio Advisor Class	_____%
PIMCO International Bond (USD-Hedged) Portfolio Advisor Class	_____%
Templeton Global Bond VIP Fund Class 2	_____%

Investment options	Percent
High Yield Bond	
Columbia Variable Portfolio High Yield Bond Class 2	_____ %
DWS High Income VIP Class B	_____ %
Federated Hermes High Income Bond II Svc	_____ %
PIMCO High Yield Portfolio Advisor Class	_____ %
Inflation Protection	
American Century VP Inflation Protection Fund II	_____ %
PIMCO Real Return Portfolio Advisor Class	_____ %
Bank Loan	
Eaton Vance VT Floating-Rate Income	_____ %
Government Bond	
American Funds IS U.S. Government Securities Fund Class 4	_____ %
Columbia Variable Portfolio US Government Mortgage 2	_____ %
Nontraditional Bond	
Columbia Variable Portfolio Strategic Income 2	_____ %
PIMCO Dynamic Bond Portfolio Advisor Class	_____ %
Ultrashort Bond	
American Funds IS Ultra-Short Bond Fund Class 4	_____ %
PIMCO Short-Term Portfolio Advisor Class	_____ %
Money Market	
Fidelity VIP Government Money Market Service Class 2	_____ %
Total investment election	**100%**

The total of investment options must equal 100%. If it does not equal 100%, this application will be considered not in good order.

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Investment options are valid as of 11/01/2023. Please see prospectus for any applicable changes.

4. Signatures

Either the Owner(s) or Registered Representative with telephone authorization must sign this form.

Owner or Registered Representative's Signature	Date signed (mm/dd/yyyy)
Joint Owner's signature (if applicable)	Date signed (mm/dd/yyyy)