

# 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 that 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.



NOT FDIC/NCUA INSURED, MAY LOSE VALUE INCLUDING LOSS OF PRINCIPAL, NO BANK/ CU GUARANTEE, NOT A DEPOSIT, NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY.

### 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	Income	Percent
Conservative	_____ %	High Income	_____ %
Moderate	_____ %	Diversified Income	_____ %
Moderate Growth	_____ %		
Growth	_____ %		
Aggressive Growth	_____ %		



Investment options	Percent
<b>Large Value</b>	
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	_____ %
Pioneer Equity Income VCT Portfolio Class II	_____ %
Principal VC Equity Income 3	_____ %
<b>Large Blend</b>	
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	_____ %
Lord Abbett Series Fund Fundamental Equity Portfolio VC	_____ %
MFS VIT II Blended Research Core Equity Portfolio Service Class	_____ %
<b>Large Growth</b>	
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	_____ %

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

Investment options	Percent
Principal VC Blue Chip 3	_____ %
Rydex VIF S&P 500 Pure Growth Fund	_____ %
T. Rowe Price Blue Chip Growth II	_____ %
<b>Mid Value</b>	
AB VPS Small/Mid Cap Value Portfolio B	_____ %
American Century VP Mid Cap Value Fund II	_____ %
Janus Henderson VIT Mid Cap Value Portfolio Service Shares	_____ %
<b>Mid Blend</b>	
ClearBridge Variable Mid Cap Portfolio Class II	_____ %
<b>Mid Growth</b>	
Federated Hermes Kaufmann II Svc	_____ %
Fidelity VIP Mid Cap Portfolio Service Class 2	_____ %
Invesco V.I. Discovery Mid Cap Growth II	_____ %
Janus Henderson VIT Enterprise Service Shares	_____ %
<b>Small Value</b>	
Guggenheim VIF Small Cap Value Fund (Series Q)	_____ %
Royce Capital Fund – Small-Cap Portfolio Service Class	_____ %
<b>Small Blend</b>	
DWS Small Cap Index VIP Class B	_____ %
Invesco V.I. Main Street Small Cap II	_____ %
Invesco V.I. Small Cap Equity II	_____ %
<b>Small Growth</b>	
ClearBridge Variable Small Cap Growth Portfolio Class II	_____ %
MFS VIT New Discovery Portfolio Service Class	_____ %
<b>International Large</b>	
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	_____ %
MFS VIT II International Intrinsic Value Portfolio Service Class	_____ %
Templeton Foreign VIP Fund Class 2	_____ %

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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
<b>International Small</b>	
American Funds IS Global Small Capitalization Fund Class 4	_____ %
<b>World Stock</b>	
American Funds IS Global Growth Fund Class 4	_____ %
American Funds IS Capital World Growth and Income Fund Class 4	_____ %
Invesco V.I. Global II	_____ %
Janus Henderson VIT Global Research Portfolio Service Shares	_____ %
<b>Emerging Markets</b>	
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	_____ %
<b>Commodities/Precious Metals</b>	
PIMCO Commodity Real Return Strategy Portfolio Advisor Class	_____ %
<b>Energy/Natural Resources</b>	
ALPS   Alerian Energy Infrastructure Portfolio Class III	_____ %
VanEck VIP Global Resources S	_____ %
<b>Financial</b>	
JHVIT Financial Industries II	_____ %
<b>Health</b>	
T. Rowe Price Health Sciences II	_____ %
<b>Real Estate</b>	
Fidelity VIP Real Estate Portfolio Service Class 2	_____ %
MFS VIT III Global Real Estate Service	_____ %
<b>Technology</b>	
Columbia Variable Portfolio Seligman Global Tech 2	_____ %
Janus Henderson VIT Global Technology and Innovation Portfolio Service Shares	_____ %
MFS VIT II Technology Portfolio Service Class	_____ %
<b>Utilities</b>	
MFS VIT Utilities Portfolio Service Class	_____ %
<b>Balanced</b>	
AB VPS Dynamic Asset Allocation Portfolio B	_____ %
American Century VP Balanced II	_____ %
American Funds IS Asset Allocation Fund Class 4	_____ %
Franklin Income VIP Fund Class 2	_____ %

Investment options	Percent
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	_____ %
<b>Risk Based Allocation</b>	
Fidelity VIP FundsManager 50% Portfolio Service Class 2	_____ %
Fidelity VIP FundsManager 70% Portfolio Service Class 2	_____ %
Fidelity VIP FundsManager 85% Portfolio Service Class 2	_____ %
<b>Socially Responsible</b>	
Calvert VP SRI Balanced F	_____ %
Calvert VP SRI Mid Cap Portfolio	_____ %
Pioneer VCT Portfolio Class II	_____ %
<b>World Allocation</b>	
American Funds IS Capital Income Builder Class 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	_____ %
<b>Tactical</b>	
ALPS   Red Rocks Global Opportunity III Fund	_____ %
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	_____ %
<b>Short-Term Bond</b>	
Lord Abbett Series Short Duration Income Portfolio VC	_____ %
PIMCO Low Duration Portfolio Advisor Class	_____ %
<b>Intermediate Bond</b>	
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	_____ %

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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 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	_____ %
<b>Multisector Bond</b>	
Columbia Variable Portfolio Strategic Income 2	_____ %
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	_____ %
Pioneer Strategic Income VCT Portfolio Class II	_____ %
<b>World Bond</b>	
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	_____ %
<b>High Yield Bond</b>	
Columbia Variable Portfolio High Yield Bond Class 2	_____ %

Investment options	Percent
DWS High Income VIP Class B	_____ %
Federated Hermes High Income Bond II Svc	_____ %
PIMCO High Yield Portfolio Advisor Class	_____ %
Western Asset Variable Global High Yield Bond Portfolio Class II	_____ %
<b>Inflation Protection</b>	
American Century VP Inflation Protection Fund II	_____ %
PIMCO Real Return Portfolio Advisor Class	_____ %
<b>Bank Loan</b>	
Eaton Vance VT Floating-Rate Income	_____ %
<b>Government Bond</b>	
American Funds IS U.S. Government Securities Fund Class 4	_____ %
Columbia Variable Portfolio US Government Mortgage 2	_____ %
<b>Unconstrained Bond</b>	
PIMCO Dynamic Bond Portfolio Advisor Class	_____ %
<b>Ultrashort Bond</b>	
American Funds IS Ultra-Short Bond Fund Class 4	_____ %
PIMCO Short-Term Portfolio Advisor Class	_____ %
<b>Total investment election</b>	<b>100%</b>

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 5/1/2022. 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)
<input type="text"/>	<input type="text"/>
Joint Owner's signature (if applicable)	Date signed (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>

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