Reset Form

Dollar Cost Averaging (DCA) Program Form

LiveWell® Variable Annuity
Issued by Midland National® Life Insurance Company

SAMMONS Retirement Solutions® | MIDLAND NATIONAL® Life Insurance Company

Sammons Retirement Solutions®
P.O. Box 758547, Topeka, KS 66675-8547

Overnight: Mail Zone 547, 5801 SW 6th Ave.
Topeka, KS 66636-1001

Phone: 1-866-747-3421 | **Fax:** 1-866-511-7038

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)			SSN
Joint Owner's Name (first, middle initial, last) - If applicable			SSN
Non-Natural Owner - If applicable			TIN/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.

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	_____ %

POWERED BY MORNINGSTAR®

INVESTMENT OPTIONS	PERCENT
LARGE VALUE	
American Century VP Income & Growth II	_____ %
American Century VP Value Fund II	_____ %
American Funds IS Blue Chip Income and Growth 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	_____ %
Pioneer Equity Income VCT Portfolio Class 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 Oppenheimer Main Street Fund/VA Service Class	_____ %
Lord Abbett Series Fund Fundamental Equity Portfolio VC	_____ %
MFS VIT II Blended Research Core Equity Portfolio Service Class	_____ %
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	_____ %
Ivy VIP Growth	_____ %
Rydex VIF S&P 500® Pure Growth Fund	_____ %
T. Rowe Price Blue Chip Growth II	_____ %

INVESTMENT OPTIONS	PERCENT
MID VALUE	
AB VPS Small/Mid Cap Value Portfolio B	_____ %
American Century VP Mid Cap Value Fund II	_____ %
DWS Small Mid Cap Value VIP Class B	_____ %
Janus Henderson VIT Mid Cap Value Portfolio Service Shares	_____ %
MID BLEND	
Calvert VP SRI Mid Cap Portfolio	_____ %
ClearBridge Variable Mid Cap Portfolio Class II	_____ %
MID GROWTH	
Federated Hermes Kaufmann II Svc	_____ %
Fidelity VIP Mid Cap Portfolio Service Class 2	_____ %
Invesco Oppenheimer Discovery Mid Cap Growth Fund/VA Service Class	_____ %
Ivy VIP Mid Cap Growth	_____ %
Janus Henderson VIT Enterprise Service Shares	_____ %
SMALL VALUE	
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 Oppenheimer Main Street Small Cap Fund/VA Service Class	_____ %
Ivy VIP Small Cap Core	_____ %
SMALL GROWTH	
ClearBridge Variable Small Cap Growth Portfolio Class II	_____ %
Ivy VIP Small Cap Growth	_____ %
Lord Abbett Series Fund Developing Growth Portfolio VC	_____ %
MFS VIT New Discovery Portfolio Service Class	_____ %

Investment Options continued on page 3 ►

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
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 International Growth Fund/VA Service Class	_____ %
Ivy VIP International Core Equity	_____ %
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	_____ %
INTERNATIONAL SMALL	
American Funds IS Global Small Capitalization Fund Class 4	_____ %
WORLD STOCK	
American Funds IS Global Growth Fund Class 4	_____ %
American Funds IS Global Growth and Income Fund Class 4	_____ %
Franklin Mutual Global Discovery VIP Fund Class 2	_____ %
Invesco Oppenheimer Global Fund/VA Service Class	_____ %
Janus Henderson VIT Global Research Portfolio Service Shares	_____ %
EMERGING MARKETS	
American Funds IS New World Fund Class 4	_____ %
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	_____ %
Ivy VIP Energy	_____ %
Ivy VIP Natural Resources	_____ %
VanEck VIP Global Hard Assets Fund S	_____ %
FINANCIAL	
JHVIT Financial Industries II	_____ %
HEALTH	
T. Rowe Price Health Sciences II	_____ %
REAL ESTATE	
Fidelity VIP Real Estate Portfolio Service Class 2	_____ %
MFS VIT III Global Real Estate Service	_____ %

INVESTMENT OPTIONS	PERCENT
TECHNOLOGY	
Columbia Variable Portfolio Seligman Global Tech 2	_____ %
Ivy VIP Science and Technology	_____ %
Janus Henderson VIT Global Technology and Innovation Portfolio Service Shares	_____ %
MFS VIT II Technology Portfolio Service Class	_____ %
UTILITIES	
MFS VIT Utilities Portfolio Service Class	_____ %
BALANCED	
AB VPS Dynamic Asset Allocation Portfolio B	_____ %
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 Mutual Shares VIP Fund Class 2	_____ %
Janus Henderson VIT Balanced Portfolio Service Shares	_____ %
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	_____ %
WORLD ALLOCATION	
American Funds IS Capital Income Builder Class 4	_____ %
BlackRock Global Allocation V.I. Fund Class III	_____ %
Lazard Retirement Global Dynamic Multi Asset Portfolio Service Shares	_____ %
MFS VIT II Global Tactical Allocation Portfolio Service Class	_____ %
TACTICAL	
ALPS | Red Rocks Listed Private Equity 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	_____ %

Investment Options continued on page 4 ►

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
SHORT-TERM BOND	
Lord Abbett Series Short Duration Income Portfolio VC	_____ %
PIMCO Low Duration Portfolio Advisor Class	_____ %
INTERMEDIATE BOND	
Invesco Oppenheimer Total Return Bond Fund/VA Service Class	_____ %
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	
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	_____ %
WORLD BOND	
Columbia Variable Portfolio Emerging Markets Bond Class 2	_____ %
Ivy VIP Global Bond	_____ %
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	_____ %
Federated Hermes High Income Bond II Svc	_____ %
Fidelity VIP High Income Portfolio Service Class 2	_____ %
Ivy VIP High Income	_____ %
PIMCO High Yield Portfolio Advisor Class	_____ %
Western Asset Variable Global High Yield Bond Portfolio Class II	_____ %
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/AAA-Rated Securities Fund Class 4	_____ %
Columbia Variable Portfolio US Government Mortgage 2	_____ %
UNCONSTRAINED BOND	
PIMCO Dynamic Bond Portfolio Advisor Class	_____ %
ULTRASHORT BOND	
American Funds IS Ultra-Short Bond Fund Class 4	_____ %
PIMCO Short-Term Portfolio Advisor Class	_____ %
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.

Morningstar Investment Management LLC is a registered investment adviser and subsidiary of Morningstar, Inc. Morningstar Investment Management provides nondiscretionary consulting services to Sammons Institutional Group℠, Inc. (SIG) but is not acting in the capacity of adviser to individual investors. Morningstar Investment Management provides recommendations to SIG regarding asset allocation targets, for certain LiveWell® products/programs, which are subject to change without notice. Morningstar Investment Management establishes the allocations using its proprietary asset classifications. If alternative classification methods are used, the allocations may not meet the asset allocation targets. The Morningstar name and logo are registered marks of Morningstar, Inc. Morningstar Investment Management is not affiliated with SIG.

Rydex is an affiliate of Guggenheim Partners, LLC ("Guggenheim"). Guggenheim is a global diversified financial services firm that provides asset management, investment banking and capital markets services, along with insurance, institutional finance, and investment advisory solutions. Guggenheim is an indirect, partially owned subsidiary of Sammons Enterprises, Inc. which is also the parent company of Midland National® Life Insurance Company and Sammons Institutional Group℠, Inc.

Investment options are valid as of 5/1/2020. 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	Joint Owner's Signature (If applicable)	Date Signed
▶	▶	▶	▶

If your request is not in good order, how would you like us to notify you?

☐ Call me at ________________ ☐ Mail a letter to my address of record ☐ Contact my Registered Representative