Reset Form

LiveWell Variable Annuity allocation change form

MIDLAND NATIONAL® | SAMMONS RETIREMENT SOLUTIONS®

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 transfer between investment option(s) or model(s); change current or future allocations; or to elect, change, or cancel automatic portfolio rebalancing.

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. Investment option transfer

Transfer all or a portion of the amount invested in specific investment option(s) or model(s) to one or more investment option(s) or model(s). This will not alter allocations for future investments in your Contract unless you select the applicable option under Portfolio Reallocation. ***Please use EITHER dollar amounts or percentages.***

Percentage	or	Dollar amount	From (Source Investment Option or Model)	To (Destination Investment Option or Model)
1. %	or	$		
2. %	or	$		
3. %	or	$		
4. %	or	$		
5. %	or	$		
6. %	or	$		
7. %	or	$		
8. %	or	$		
9. %	or	$		
10. %	or	$		

3. Portfolio reallocation

For questions or assistance, please call the Service Center at 866-747-3421. ***Check all that apply.***

A. Please update one or more of the following:

☐ **Current allocations:** reallocate my portfolio immediately upon receipt of this request.

☐ **Future allocations:** allocate future contributions according to the percentages indicated on this form.

B. Automatic portfolio rebalancing (check one):

☐ **Elect automatic portfolio rebalancing:** the accumulation value will rebalance to the portfolios selected in the investment elections section. Rebalancing will occur on the Contract Anniversary of the month according to the elected frequency. If a frequency is not selected, the default is quarterly. Please consult your prospectus for details regarding this feature, as well as restrictions, minimum or maximum limitations, and other applicable information. Automatic portfolio rebalancing cannot be elected if you participate in dollar cost averaging. Please indicate frequency: ☐ Quarterly ☐ Semi-annually ☐ Annually

☐ **Change automatic portfolio rebalancing:** change the designated investment options for any existing program to match the investment options indicated on this form. Change the designated frequency for an existing program to match this form. Please indicate frequency: ☐ Quarterly ☐ Semi-annually ☐ Annually

☐ **Cancel automatic portfolio rebalancing:** continue to signature section.

4. 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	_____ %
Pioneer Equity Income VCT Portfolio Class II	_____ %
Principal VC Equity Income 3	_____ %
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	_____ %
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	_____ %
Franklin DynaTech VIP Fund Class 2	_____ %
Principal VC Blue Chip 3	_____ %
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	_____ %
Janus Henderson VIT Mid Cap Value Portfolio Service Shares	_____ %
Mid Blend	
ClearBridge Variable Mid Cap Portfolio Class II	_____ %
Mid Growth	
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	_____ %
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 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	_____ %
MFS VIT II International Intrinsic Value Portfolio Service Class	_____ %
Templeton Foreign VIP Fund Class 2	_____ %

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4. 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 Small	
American Funds IS Global Small Capitalization Fund Class 4	_____ %
World Stock	
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	_____ %
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	_____ %
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	_____ %
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	_____ %
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	_____ %
Franklin Income VIP Fund Class 2	_____ %
Invesco V.I. Equity and Income II	_____ %
Janus Henderson VIT Balanced Portfolio Service Shares	_____ %

Investment options	Percent
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	_____ %
Socially Responsible	
Calvert VP SRI Balanced F	_____ %
Calvert VP SRI Mid Cap Portfolio	_____ %
Pioneer VCT Portfolio Class II	_____ %
World Allocation	
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	_____ %
Tactical	
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	_____ %
Short-Term Bond	
Lord Abbett Series Short Duration Income Portfolio VC	_____ %
PIMCO Low Duration Portfolio Advisor Class	_____ %
Intermediate Bond	
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	_____ %

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4. 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
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	_____ %
PIMCO Emerging Markets Bond Portfolio Advisor Class	_____ %
PIMCO International Bond (USD-Hedged) Portfolio Advisor Class	_____ %
Templeton Global Bond VIP Fund Class 2	_____ %
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	_____ %
Western Asset Variable Global High Yield Bond Portfolio Class II	_____ %

Investment options	Percent
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	_____ %
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.

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Investment options are valid as of 5/1/2022. Please see prospectus for any applicable changes.

5. Signatures

All Owners are required to 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)

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