Reset Form

LiveWell Dynamic 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
1-866-747-3421 | SecuritiesPI@sfgmembers.com

Instructions

Use this form to transfer between separate account investment option(s) or cycle investment option(s); change current or future allocations; or to elect, change, or cancel automatic portfolio rebalancing.

1. Account 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 separate account investment option(s) or cycle investment option(s) to one or more separate account investment option(s) or cycle investment option(s).This will not alter allocations for future investments. ***Please use EITHER dollar amounts or percentages.***

Percentage	or	Dollar amount	From (source separate account or cycle investment option)	To (destination separate account or cycle investment option)
1. %	or	$		
2. %	or	$		
3. %	or	$		
4. %	or	$		
5. %	or	$		
6. %	or	$		
7. %	or	$		
8. %	or	$		
9. %	or	$		
10. %	or	$		

Investments can only be made into cycle investment options prior to the cycle's start date. Once the cycle has launched or is active, no additional investments are allowed in that cycle.

3. Portfolio reallocation (only available for separate account investment options)

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.

Separate account 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 request will not be considered in good order.

Investment options	Percent
Equity	
American Funds IS Global Growth Fund Class 4	_____ %
ClearBridge Variable Small Cap Growth Portfolio Class II	_____ %
DWS Equity 500 Index VIP Class B	_____ %
Fidelity VIP Growth Opportunities Portfolio Service Class 2	_____ %
Fidelity VIP Mid Cap Portfolio Service Class 2	_____ %
Principal VC Equity Income 3	_____ %

Investment options	Percent
Fixed Income	
Lord Abbett Series Fund Bond Debenture Portfolio VC	_____ %
Lord Abbett Series Short Duration Income Portfolio VC	_____ %
PIMCO Real Return Portfolio Advisor Class	_____ %
PIMCO Short-Term Portfolio Advisor Class	_____ %
Western Asset Variable Core Bond Plus Portfolio Class II	_____ %
Balanced	
American Funds IS Asset Allocation Fund Class 4	_____ %
Calvert VP SRI Balanced F	_____ %

If you elect any of the cycle investments options below, once your purchase payment is received they will first be placed into the default account until your Cycle becomes available on the Cycle start date.

1-year term		
Index	Protection level	Percent
S&P 500® Index	10% Buffer	_____ %
S&P 500® Index	10% Floor	_____ %

3-year term		
Index	Protection level	Percent
S&P 500® Index	10% Buffer	_____ %
S&P 500® Index	10% Floor	_____ %

6-year term		
Index	Protection level	Percent
S&P 500® Index	20% Buffer	_____ %
S&P 500® Index	30% Buffer	_____ %
S&P 500® Index	10% Floor	_____ %

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

4. 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)**