

LiveWell Dynamic Annuity® dollar cost averaging (DCA) program form



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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 only available for any allocations into the separate account investment options. The DCA program may not be elected if you are invested in any cycle investment options or 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 purchase payment received without express written allocation instructions will be directed to the separate account investment option allocation instructions at time of contract issuance.

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 \$_____ 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 page.

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 request will not be considered in good order.

Investment options	Percent
Equity	
ClearBridge Variable Small Cap Growth Portfolio Class II	_____ %
DWS Equity 500 Index VIP Class B	_____ %
Fixed Income	
Western Asset Variable Core Bond Plus Portfolio Class II	_____ %

Investment options	Percent
Balanced	
American Funds IS® Global Growth 4	_____ %
Money Market	
Fidelity VIP Government Money Market Service Class 2	_____ %

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

Investment options are valid as of 11/1/2023. Please see prospectus for any applicable changes.

4. Fraud warning

For California residents only:

For your protection California law requires the following to appear on this form: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

5. 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"/>

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.

Securities distributed by Sammons Financial Network®, LLC., member FINRA. Insurance products are issued by Midland National® Life Insurance Company (West Des Moines, IA). Sammons Institutional Group®, Inc. provides administrative services. Sammons Financial Network®, LLC., Midland National® Life Insurance Company, and Sammons Institutional Group®, Inc. are wholly owned subsidiaries of Sammons® Financial Group, Inc. Sammons Retirement Solutions® is a division of Sammons Institutional Group®, Inc.

