

Questions? Call our Service Center at 1-800-888-2461.

Instructions

Please type or print.

Use this form to request periodic exchanges from one investment option to one or more investment options. Complete the entire form.

1. Provide General Information

☐ **Application Attached or Contract Number** _____

Name of Owner _____

Mailing Address _____
Street Address City State Zip Code

Social Security/Tax I.D. Number _____

Daytime Phone Number _____ **Mobile/Home Phone Number** _____

2. Set Up Dollar Cost Averaging

Please complete each sub-section.

A. Effective Date _____
Date (mm/dd/yyyy – must be between 1st and 28th of the month)

If no date is indicated, or date indicated is prior to the date of receipt, the first transfer will occur on the date the request is received in proper form.

B. Frequency (check one):

☐ Monthly ☐ Quarterly ☐ Semi-Annually ☐ Annually

C. Option (check one):

☐ \$ _____ per transfer over _____ months/years.

☐ % _____ per transfer over _____ months/years.

☐ Fixed Period over _____ months/years.

☐ Only Interest/Earnings over _____ months/years.

(Earnings will accrue for one time period – i.e. monthly or quarterly – from the effective date before the first transfer occurs.)

Continued on Next Page ►



3. Provide Investment Directions

Transfer From (choose only one):

- | | |
|--|---|
| ☐ Allspring Opportunity VT | ☐ Rydex VIF Government Long Bond 1.2x Strategy |
| ☐ Federated Hermes Fund for U.S. Government Securities II | ☐ Rydex VIF Health Care |
| ☐ Federated Hermes High Income Bond II | ☐ Rydex VIF Internet |
| ☐ Fidelity® VIP Contrafund® | ☐ Rydex VIF Inverse Dow 2x Strategy |
| ☐ Fidelity® VIP Growth Opportunities | ☐ Rydex VIF Inverse Government |
| ☐ Fidelity® VIP Index 500 | ☐ Long Bond Strategy |
| ☐ Fidelity® VIP Investment | ☐ Rydex VIF Inverse Mid-Cap Strategy |
| ☐ Grade Bond | ☐ Rydex VIF Inverse NASDAQ-100® Strategy |
| ☐ Franklin Small-Mid Cap | ☐ Rydex VIF Inverse Russell 2000® Strategy |
| ☐ Growth VIP Fund | ☐ Rydex VIF Inverse S&P 500 Strategy |
| ☐ Guggenheim VIF Large Cap Value | ☐ Rydex VIF Japan 2x Strategy |
| ☐ Guggenheim VIF Multi-Hedge Strategies | ☐ Rydex VIF Leisure |
| ☐ Invesco V.I. American Franchise | ☐ Rydex VIF Mid-Cap 1.5x Strategy |
| ☐ Invesco V.I. EQV International Equity | ☐ Rydex VIF NASDAQ-100® |
| ☐ Invesco V.I. Government Securities | ☐ Rydex VIF NASDAQ-100® 2x Strategy |
| ☐ Invesco V.I. Main Street | ☐ Rydex VIF Nova |
| ☐ Mid Cap Fund® | ☐ Rydex VIF Precious Metals |
| ☐ Invesco V.I. Main Street | ☐ Rydex VIF Real Estate |
| ☐ Small Cap Fund® | ☐ Rydex VIF Retailing |
| ☐ NAA All Cap Value Series | ☐ Rydex VIF Russell 2000® 1.5x Strategy |
| ☐ NAA Mid Growth Series | ☐ Rydex VIF Russell 2000® 2x Strategy |
| ☐ NAA Small Cap Value Series | ☐ Rydex VIF S&P 500 2x Strategy |
| ☐ NAA SMid Cap Value Series | ☐ Rydex VIF S&P 500 Pure Growth |
| ☐ NAA World Equity Income Series | ☐ Rydex VIF S&P 500 Pure Value |
| ☐ Neuberger Berman AMT Sustainable Equity | ☐ Rydex VIF S&P MidCap 400 Pure Growth |
| ☐ PIMCO VIT Low Duration | ☐ Rydex VIF S&P MidCap 400 Pure Value |
| ☐ PIMCO VIT Real Return | ☐ Rydex VIF S&P SmallCap 600 Pure Growth |
| ☐ PIMCO VIT Total Return | ☐ Rydex VIF S&P SmallCap 600 Pure Value |
| ☐ Rydex VIF Banking | ☐ Rydex VIF Strengthening Dollar 2x Strategy |
| ☐ Rydex VIF Basic Materials | ☐ Rydex VIF Technology |
| ☐ Rydex VIF Biotechnology | ☐ Rydex VIF Telecommunications |
| ☐ Rydex VIF Commodities Strategy | ☐ Rydex VIF Transportation |
| ☐ Rydex VIF Consumer Products | ☐ Rydex VIF U.S. Government Money Market |
| ☐ Rydex VIF Dow 2x Strategy | ☐ Rydex VIF Utilities |
| ☐ Rydex VIF Electronics | ☐ Rydex VIF Weakening Dollar 2x Strategy |
| ☐ Rydex VIF Energy | ☐ Templeton Emerging Markets VIP Fund |
| ☐ Rydex VIF Energy Services | ☐ Templeton Foreign VIP Fund |
| ☐ Rydex VIF Europe 1.25x Strategy | |
| ☐ Rydex VIF Financial Services | |

Must Total 100%

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Transfer To (indicate whole percentages totaling 100%):

_____ Allspring Opportunity VT
_____ Federated Hermes Fund for U.S. Government Securities II
_____ Federated Hermes High Income Bond II
_____ Fidelity® VIP Contrafund®
_____ Fidelity® VIP Growth Opportunities
_____ Fidelity® VIP Index 500
_____ Fidelity® VIP Investment
_____ Grade Bond
_____ Franklin Small-Mid Cap
_____ Growth VIP Fund
_____ Guggenheim VIF All Cap Value
_____ Guggenheim VIF Large Cap Value
_____ Guggenheim VIF Multi-Hedge Strategies
_____ Guggenheim VIF Small Cap Value
_____ Guggenheim VIF SMid Cap Value
_____ Guggenheim VIF StylePlus Mid Growth
_____ Guggenheim VIF World Equity Income
_____ Invesco V.I. American Franchise
_____ Invesco V.I. EQV International Equity
_____ Invesco V.I. Government Securities
_____ Invesco V.I. Main Street
_____ Mid Cap Fund®
_____ Invesco V.I. Main Street
_____ Small Cap Fund®
_____ Neuberger Berman AMT Sustainable Equity
_____ PIMCO VIT Low Duration
_____ PIMCO VIT Real Return
_____ PIMCO VIT Total Return
_____ Rydex VIF Banking
_____ Rydex VIF Basic Materials
_____ Rydex VIF Biotechnology
_____ Rydex VIF Commodities Strategy
_____ Rydex VIF Consumer Products
_____ Rydex VIF Dow 2x Strategy
_____ Rydex VIF Electronics
_____ Rydex VIF Energy
_____ Rydex VIF Energy Services
_____ Rydex VIF Europe 1.25x Strategy
_____ Rydex VIF Financial Services

_____ Rydex VIF Government Long Bond 1.2x Strategy
_____ Rydex VIF Health Care
_____ Rydex VIF Internet
_____ Rydex VIF Inverse Dow 2x Strategy
_____ Rydex VIF Inverse Government
_____ Long Bond Strategy
_____ Rydex VIF Inverse Mid-Cap Strategy
_____ Rydex VIF Inverse NASDAQ-100® Strategy
_____ Rydex VIF Inverse Russell 2000® Strategy
_____ Rydex VIF Inverse S&P 500 Strategy
_____ Rydex VIF Japan 2x Strategy
_____ Rydex VIF Leisure
_____ Rydex VIF Mid-Cap 1.5x Strategy
_____ Rydex VIF NASDAQ-100®
_____ Rydex VIF NASDAQ-100® 2x Strategy
_____ Rydex VIF Nova
_____ Rydex VIF Precious Metals
_____ Rydex VIF Real Estate
_____ Rydex VIF Retailing
_____ Rydex VIF Russell 2000® 1.5x Strategy
_____ Rydex VIF Russell 2000® 2x Strategy
_____ Rydex VIF S&P 500 2x Strategy
_____ Rydex VIF S&P 500 Pure Growth
_____ Rydex VIF S&P 500 Pure Value
_____ Rydex VIF S&P MidCap 400 Pure Growth
_____ Rydex VIF S&P MidCap 400 Pure Value
_____ Rydex VIF S&P SmallCap 600 Pure Growth
_____ Rydex VIF S&P SmallCap 600 Pure Value
_____ Rydex VIF Strengthening Dollar 2x Strategy
_____ Rydex VIF Technology
_____ Rydex VIF Telecommunications
_____ Rydex VIF Transportation
_____ Rydex VIF U.S. Government Money Market
_____ Rydex VIF Utilities
_____ Rydex VIF Weakening Dollar 2x Strategy
_____ Templeton Emerging Markets VIP Fund
_____ Templeton Foreign VIP Fund

Must Total 100%

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4. Provide Signatures

I understand and authorize the transaction(s) requested on this form.

X	_____ Signature of Owner	_____ Signature Date (mm/dd/yyyy)
X	_____ Signature of Joint Owner (if applicable)	_____ Signature Date (mm/dd/yyyy)
X	_____ Signature of Financial Representative	_____ Signature Date (mm/dd/yyyy)
		_____ Print name of Financial Representative

Mail to:

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