



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

Instructions

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

1. Provide General Account Information

☐ Application Attached or Contract Number _____

Name of Owner _____
First MI Last

Mailing Address _____
Street Address City State Zip Code

Social Security Number/Tax I.D. Number _____

Daytime Phone Number _____ 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 ☐ Annually ☐ Semi-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.)

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3. Provide Investment Directions

Transfer From (choose only one):

<input type="checkbox"/> AB Discovery Value	<input type="checkbox"/> Invesco V.I. American Value	<input type="checkbox"/> Morningstar Income and Growth ETF Asset Allocation Portfolio
<input type="checkbox"/> AB VPS Dynamic Asset Allocation	<input type="checkbox"/> Invesco V.I. Comstock	<input type="checkbox"/> NAA All Cap Value Series
<input type="checkbox"/> American Funds IS® Asset Allocation	<input type="checkbox"/> Invesco V.I. Core Plus Bond	<input type="checkbox"/> NAA Large Cap Value Series
<input type="checkbox"/> American Funds IS® Capital World Bond	<input type="checkbox"/> Invesco V.I. Discovery Mid Cap Growth	<input type="checkbox"/> NAA Large Core Series
<input type="checkbox"/> American Funds IS® Global Growth	<input type="checkbox"/> Invesco V.I. Equity and Income	<input type="checkbox"/> NAA Large Growth Series
<input type="checkbox"/> American Funds IS® Growth-Income	<input type="checkbox"/> Invesco V.I. EQV International Equity	<input type="checkbox"/> NAA Mid Growth Series
<input type="checkbox"/> American Funds IS® International	<input type="checkbox"/> Invesco V.I. Global	<input type="checkbox"/> NAA Small Cap Value Series
<input type="checkbox"/> American Funds IS® New World	<input type="checkbox"/> Invesco V.I. Global Real Estate	<input type="checkbox"/> NAA Small Growth Series
<input type="checkbox"/> BlackRock Equity Dividend V.I.	<input type="checkbox"/> Invesco V.I. Government Money Market	<input type="checkbox"/> NAA SMid Cap Value Series
<input type="checkbox"/> BlackRock Global Allocation V.I.	<input type="checkbox"/> Invesco V.I. Government Securities	<input type="checkbox"/> NAA World Equity Income Series
<input type="checkbox"/> BlackRock High Yield V.I.	<input type="checkbox"/> Invesco V.I. Health Care	<input type="checkbox"/> Neuberger Berman AMT Sustainable Equity
<input type="checkbox"/> BNY Mellon IP MidCap Stock	<input type="checkbox"/> Invesco V.I. Main Street Mid Cap Fund®	<input type="checkbox"/> PIMCO VIT All Asset
<input type="checkbox"/> BNY Mellon IP Small Cap Stock Index	<input type="checkbox"/> Invesco V.I. Main Street Small Cap Fund®	<input type="checkbox"/> PIMCO VIT CommodityRealReturn Strategy
<input type="checkbox"/> BNY Mellon IP Technology Growth	<input type="checkbox"/> Janus Henderson VIT Enterprise	<input type="checkbox"/> PIMCO VIT Emerging Markets Bond
<input type="checkbox"/> BNY Mellon VIF Appreciation	<input type="checkbox"/> Janus Henderson VIT Research	<input type="checkbox"/> PIMCO VIT International Bond Portfolio (U.S. Dollar-Hedged)
<input type="checkbox"/> ClearBridge Variable Growth	<input type="checkbox"/> Lord Abbett Series Bond-Debenture VC	<input type="checkbox"/> PIMCO VIT Low Duration
<input type="checkbox"/> ClearBridge Variable Small Cap Growth	<input type="checkbox"/> Lord Abbett Series Developing Growth VC	<input type="checkbox"/> PIMCO VIT Real Return
<input type="checkbox"/> Fidelity® VIP Equity-Income	<input type="checkbox"/> LVIP American Century Mid Cap Value	<input type="checkbox"/> PIMCO VIT Total Return
<input type="checkbox"/> Fidelity® VIP Growth & Income	<input type="checkbox"/> LVIP American Century Ultra®	<input type="checkbox"/> Putnam VT Small Cap Value
<input type="checkbox"/> Fidelity® VIP Growth Opportunities	<input type="checkbox"/> LVIP American Century Value	<input type="checkbox"/> Royce Micro-Cap
<input type="checkbox"/> Fidelity® VIP High Income	<input type="checkbox"/> LVIP JPMorgan Core Bond	<input type="checkbox"/> T. Rowe Price Health Sciences
<input type="checkbox"/> Fidelity® VIP Overseas	<input type="checkbox"/> Macquarie VIP Asset Strategy	<input type="checkbox"/> Templeton Developing Markets VIP Fund
<input type="checkbox"/> Franklin Allocation VIP Fund	<input type="checkbox"/> MFS® VIT II Research International	<input type="checkbox"/> Templeton Global Bond VIP Fund
<input type="checkbox"/> Franklin Income VIP Fund	<input type="checkbox"/> MFS® VIT Total Return	<input type="checkbox"/> Western Asset Variable Global High Yield Bond
<input type="checkbox"/> Franklin Mutual Global Discovery VIP Fund	<input type="checkbox"/> MFS® VIT Utilities	<input type="checkbox"/> Fixed Account
<input type="checkbox"/> Franklin Small Cap Value VIP Fund	<input type="checkbox"/> Morgan Stanley VIF Emerging Markets Equity	
<input type="checkbox"/> Franklin Strategic Income VIP Fund	<input type="checkbox"/> Morningstar Aggressive Growth ETF Asset Allocation Portfolio	
<input type="checkbox"/> Guggenheim VIF Floating Rate Strategies	<input type="checkbox"/> Morningstar Balanced ETF Asset Allocation Portfolio	
<input type="checkbox"/> Guggenheim VIF Global Managed Futures Strategy	<input type="checkbox"/> Morningstar Conservative ETF Asset Allocation Portfolio	
<input type="checkbox"/> Guggenheim VIF High Yield	<input type="checkbox"/> Morningstar Growth ETF Asset Allocation Portfolio	
<input type="checkbox"/> Guggenheim VIF Multi-Hedge Strategies		
<input type="checkbox"/> Guggenheim VIF Total Return Bond		

Must Total 100%

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3. Provide Investment Directions

Transfer To (indicate whole percentages totaling 100%):

<input type="text"/> AB Discovery Value	<input type="text"/> Invesco V.I. American Value	<input type="text"/> Morningstar Income and Growth ETF Asset Allocation Portfolio
<input type="text"/> AB VPS Dynamic Asset Allocation	<input type="text"/> Invesco V.I. Comstock	<input type="text"/> NAA All Cap Value Series
<input type="text"/> American Funds IS® Asset Allocation	<input type="text"/> Invesco V.I. Core Plus Bond	<input type="text"/> NAA Large Cap Value Series
<input type="text"/> American Funds IS® Capital World Bond	<input type="text"/> Invesco V.I. Discovery Mid Cap Growth	<input type="text"/> NAA Large Core Series
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<input type="text"/> Guggenheim VIF Total Return Bond		

Must Total 100%

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¹ New purchases into this subaccount are limited to contract holders who had an investment in the subaccount as of the date it was closed and who maintain such investment.



4. Provide Signature

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

<input checked="" type="checkbox"/>	_____ Signature of Owner	_____ Date (mm/dd/yyyy)	<input checked="" type="checkbox"/>	_____ Signature of Joint Owner (if applicable)	_____ Date (mm/dd/yyyy)
<input checked="" type="checkbox"/>	_____ Signature of Representative (optional)	_____ Date (mm/dd/yyyy)	_____ Print Name of Representative		

Mail to:

First Security Benefit Life Insurance and Annuity Company of New York | Administrative Office

P.O. Box 750497 | Topeka, Kansas 66675-0497

Fax to: 785.368.1772

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