

Questions? Call our National Service Center at 1-800-747-3942.

Instructions

Use this form to automatically transfer account values to maintain a specific percentage allocation among your current and future investment options. Complete the entire form. Please type or print.

1. Provide General Account Information

Plan Number _____ **Plan Name** _____

Name of Participant _____
First MI Last

Mailing Address _____
Line 1 Line 2
City State Zip Code

Social Security Number/Tax I.D. Number _____

Daytime Phone Number _____ **Home Phone Number** _____

2. Set Up Asset Reallocation

Check all that apply.

A. Number of Reallocations (check one):

☐ One-time reallocation, effective _____
Date (mm/dd/yyyy)

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.

☐ Recurring – reallocation will occur on the first business day of the next month according to the frequency selected.
Frequencies are based on a calendar year.

☐ Monthly ☐ Quarterly ☐ Semi-Annually ☐ Annually

B. Future Allocations (check one):

☐ Allocate future contributions according to the percentages indicated on this form.

☐ Do not change the allocation of future contributions.

If no option is indicated above, the allocation of future contributions will not be changed.

C. Automatic Asset Reallocation (check one):

☐ Cancel ☐ Update Automatic Asset Reallocation to funds indicated in Section 3.

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3. Provide Investment Directions

Please indicate whole percentages totaling 100%.

_____ % Allspring Opportunity	_____ % Guggenheim World Equity Income
_____ % Allspring Small Company Value	_____ % Invesco Comstock
_____ % American Century Ultra®	_____ % Invesco Discovery Mid Cap Growth
_____ % BNY Mellon Appreciation	_____ % Invesco Equity and Income
_____ % Fidelity® Advisor Dividend Growth	_____ % Invesco Main Street Mid Cap
_____ % Fidelity® Advisor International Capital Appreciation	_____ % Invesco Technology
_____ % Fidelity® Advisor Stock Selector Mid Cap¹	_____ % Invesco Value Opportunities
_____ % Fidelity® Advisor Value Strategies	_____ % JPMorgan U.S. Government Money Market¹
_____ % Guggenheim Core Bond	_____ % Neuberger Berman Sustainable Equity
_____ % Guggenheim High Yield	_____ % Fixed Account¹
_____ % Guggenheim SMid Cap Value	
_____ % Guggenheim StylePlus Large Core	
_____ % Guggenheim StylePlus Mid Growth	

Must Total 100%
¹ Fund is not available for all plans.

4. Provide Signatures

I understand and/or authorize:

- the transaction(s) requested on this form.
- that the recurring Asset Reallocation option will not be cancelled if I choose to initiate any future non-scheduled transfer of assets in my account.

X _____ Signature of Participant	_____ Date (mm/dd/yyyy)	_____ (You must include your designation if signing as a trustee, executor, custodian, guardian, or attorney-in-fact.)
X _____ Signature of Financial Professional (optional)	_____ Date (mm/dd/yyyy)	_____ Print Name of Financial Professional

Mail to: Security Benefit Retirement Plan Services P.O. Box 219141 Kansas City, MO 64121-9141 Fax to: 816.701.7626	For expedited or overnight delivery: Security Benefit Retirement Plan Services 430 W. 7th Street STE 219141 Kansas City, MO 64105-1407
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