



Security Benefit Group Healthcare Reimbursement Account (HRA) Change Investment Allocations

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

Instructions

Use this form to modify your existing and/or future investment allocations. You must complete sections 1, 2, 5 and any of the following that apply:

- Future Allocation Change and/or Current Investment Allocation Change – Section 3
- Exchange of Investment Value – Section 4

Restrictions may apply; refer to the fund prospectuses. Please type or print.

1. Provide General Account Information

Plan Number _____ **Plan Name** _____

Participant Name _____
First MI Last

Mailing Address _____
Line 1 Line 2

_____ City State Zip Code

Social Security Number _____

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

2. Select the Effective Date

Effective Date _____
Date (mm/dd/yyyy) If no date is indicated, or date indicated is prior to the date of receipt, the transfer will occur on the date the request is received in proper form.

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3. Change Future / Current Investment Allocations

Complete this section if you wish to change your future allocations and/or change current investment allocations.

Select all that apply:

- ☐ Allocate future contributions as indicated in this section.
- ☐ Change current account balance as indicated in this section.
- ☐ Change allocations for the existing Automatic Asset Reallocation as indicated in this section.

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.

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4. Exchange of Investment Value

Complete this section if you wish to exchange funds within your account.

Please select one option:

- ☐ Transfer Dollars (the 'From' and 'To' amounts must equal)
- ☐ Transfer Percents (indicate whole percentages and the 'To' column must total 100%)

Transfer From:

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

Transfer To:

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

¹Fund is not available for all plans

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5. Provide Signatures

I understand and authorize the transaction requested on this form.

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

Visit us online at SecurityBenefit.com