



# 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 Cap <sup>1</sup> | _____ % Invesco Value Opportunities                        |
| _____ % Fidelity® Advisor Value Strategies                    | _____ % JPMorgan U.S. Government Money Market <sup>1</sup> |
| _____ % Guggenheim Core Bond                                  | _____ % Neuberger Berman Sustainable Equity                |
| _____ % Guggenheim High Yield                                 | _____ % Fixed Account <sup>1</sup>                         |
| _____ % Guggenheim SMid Cap Value                             | <b>Must Total 100%</b>                                     |
| _____ % Guggenheim StylePlus Large Core                       | <sup>1</sup> Fund is not available for all plans.          |
| _____ % Guggenheim StylePlus Mid Growth                       |  |

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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 Cap<sup>1</sup>
- \_\_\_\_\_ 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 Market<sup>1</sup>
- \_\_\_\_\_ Neuberger Berman Sustainable Equity
- \_\_\_\_\_ Fixed Account<sup>1</sup>

**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 Cap<sup>1</sup>
- \_\_\_\_\_ Fidelity® Advisor Value Strategies
- \_\_\_\_\_ Guggenheim Core Bond
- \_\_\_\_\_ Guggenheim High Yield
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- \_\_\_\_\_ Guggenheim StylePlus Large Core
- \_\_\_\_\_ Guggenheim StylePlus Mid Growth
- \_\_\_\_\_ Guggenheim World Equity Income
- \_\_\_\_\_ Invesco Comstock
- \_\_\_\_\_ Invesco Discovery Mid Cap Growth
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- \_\_\_\_\_ Invesco Value Opportunities
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- \_\_\_\_\_ Fixed Account<sup>1</sup>

<sup>1</sup>Fund is not available for all plans

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