

**Refer to your prospectus for additional information about the divisions of the Separate Account and Information regarding Portfolio Rebalancing. Carefully review the Disclosures in section A before completing this form.**

## A Disclosures ::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::

You may not elect Portfolio Rebalancing if the Dollar Cost Averaging (DCA) option is in effect on your policy.

The account value in at least one of the selected divisions must vary from your chosen ratio by at least \$25.00 in order for rebalancing to occur.

The premium allocation percentages must be in whole numbers and the sum of the allocation percentages must equal 100%.

All of the existing divisions will be rebalanced to the divisions designated on this form.

The Guaranteed Principal Account (GPA) is not a division of the Separate Account and is not eligible as a designated division in our Portfolio Rebalancing program.

If the Portfolio Rebalancing election is made while an earlier Portfolio Rebalancing election is currently in effect for the policy, the new election will supersede the current one as of the new effective date. Only one Portfolio Rebalancing election is allowed for a given Valuation Date.

## B Policy Information ::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::

1. Policy number(s): \_\_\_\_\_
2. Insured full legal name (First, MI, Last, Suffix): \_\_\_\_\_
3. Additional Insured full legal name (First, MI, Last, Suffix): \_\_\_\_\_

## C Owner Information ::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::

1. Full legal name: \_\_\_\_\_
2. Phone number: \_\_\_\_\_ ☐ Home ☐ Work ☐ Cell

☐ **Receive a text message regarding the status of this request.** By checking this box, you agree to receive text messages regarding this request to your mobile phone. These messages may be sent through an automated system. Standard message and data rates may apply to any SMS or MMS you send or receive as part of this program. You may reply to a text with STOP to cancel notifications at any time.

3. Email address: \_\_\_\_\_

☐ **Receive an email regarding the status of this request.** By checking this box, you agree to receive emails regarding this request to your email address. These emails may be sent through an automated system

4. Is this policy collaterally assigned? ☐ Yes ☐ No

**If Yes, complete assignee information below. If No, skip to section D – Dollar Cost Averaging Information.**

☐ Individual(s) → Print individual's full legal name (First, MI, Last, Suffix): \_\_\_\_\_

☐ Corporate Entity → Print Entity name: \_\_\_\_\_

☐ Trust → Print full name & date of Trust (mm/dd/yyyy): \_\_\_\_\_

## D Portfolio Rebalancing Information ::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::::

**Carefully review section A - Disclosures before completing the following questions. If a termination date is not provided, Portfolio Rebalancing will continue as long as your designated rebalancing divisions are available.**

1. Frequency (Select one): ☐ Monthly ☐ Quarterly ☐ Semi-Annual ☐ Annual ☐ Cancel Rebalancing (**skip to question 3**)
2. Start date (Enter 1st - 28th): \_\_\_\_\_
3. End date (Enter date (mm/dd/yyyy) or number of years): \_\_\_\_\_



