



Owner(s) Names(s) (Last, First)

Contract Number (if known)

**Section 1: Asset Rebalancing** (Cannot be in effect at the same time as any DCA program unless it is Enhanced DCA.)

Not available for Group Strategic Edge, Templeton Investment Plus.

- A. **Frequency** (Check one):  Monthly  Quarterly  Semi-Annually  Annually  
 B. **Start Date** (Check one):  Current Receipt Date  Calendar 3/31, 6/30, 9/30, 12/31  Other: \_\_\_\_\_  
 C. If you **have elected** a valid Asset Allocation Option, completing this section will activate asset rebalancing according to that option.  
 D. If you **have not elected** an Asset Allocation Option, your contract will be rebalanced according to the premium allocation currently on file for your contract.  
 If you wish to allocate your funds to different investment options than those on file, complete Section 3 below.

**Section 2: Dollar Cost Averaging (DCA)** (NO DCA program can be in effect at the same time as Asset Rebalancing unless it is Enhanced DCA.)

A. Select Option 1 OR Option 2 (Option 1 not available for Phoenix Income Choice or Freedom Edge.)

**Option 1 – Enhanced DCA:** I elect DCA from the Guaranteed Interest Account (GIA) for a period of: \_\_\_ 6 months \_\_\_ 12 months

I have NO DCA program currently in effect.

I HAVE a DCA program in effect, and I elect to terminate that program and start a new one for the current deposit alone. The money in the terminated DCA program will be moved to the investment options designated for my contract.

When enrolling in an Enhanced DCA Program, the start date must always be the following business day. Subsequent deposits, 1035 exchanges/rollovers/transfers into a newly set up Enhanced DCA Program will be accepted if received within 60 calendar days from the Application Sign Date. Subsequent funds received more than 60 calendar days after the Application Sign Date will be allocated to the investment options designated for your contract. Alternatively, if you wish to apply subsequent funds to a currently offered Enhanced DCA Program, you may elect to terminate your existing program, and enroll in a new Enhanced DCA Program for the amount of the subsequent premium only.

**Option 2 – Standard DCA:** I elect DCA from the \_\_\_\_\_ investment option (list only one investment option, not GIA) to transfer a total amount of \$ \_\_\_\_\_ over a period of \_\_\_\_\_ months at a frequency of:  Monthly  Quarterly  Semi-Annually  Annually. The start date will be \_\_\_\_\_. (If not specified, the start will be the following calendar day.)

B. If you **have elected** a valid Asset Allocation Option, 100% of your premium will be initially allocated to the GIA (Enhanced DCA). Then, on a monthly basis, your premium will be allocated to the Asset Allocation Option currently on file for your contract.

C. If you **have not elected** an Asset Allocation Option, your premium will be allocated FROM the GIA (Enhanced DCA) or FROM an investment option (Standard DCA) as indicated in "A" above. The funds will be allocated TO the investment options specified in the premium allocation currently on file for your contract.

If you wish to allocate your funds to different investment options than those on file, complete Section 3 below.

**Section 3: Investment Option Choices for Asset Rebalancing and DCA if different than the premium allocation on file.**

(Not applicable if you are invested in an Asset Allocation Option. Whole percentages only. Must total 100%. Maximum 18 choices.)

- |  |  |
|--|--|
| _____% (225) AB VPS Balanced Hedged Allocation Portfolio                             | _____% (202) PIMCO VIT CommodityRealReturn <sup>®</sup> Strategy Portfolio   |
| _____% (108) Columbia Variable Portfolio - Acorn Fund                                | _____% (203) PIMCO VIT Real Return Portfolio   |
| _____% (109) Columbia Variable Portfolio - Acorn International Fund                  | _____% (204) PIMCO VIT Total Return Portfolio  |
| _____% (229) CVT S&P Midcap 400 Index Portfolio                                      | _____% (106) Templeton Developing Markets VIP Fund   |
| _____% (167) DWS Equity 500 Index VIP  | _____% (111) Templeton Foreign VIP Fund  |
| _____% (228) DWS Small Cap Index VIP   | _____% (107) Templeton Growth VIP Fund   |
| _____% (125) Federated Hermes Fund for U.S. Government Securities II                 | _____% (215) TVST Touchstone Balanced Fund   |
| _____% (235) Federated Hermes Government Money Fund II (Service Shares)              | _____% (216) TVST Touchstone Bond Fund   |
| _____% (126) Federated Hermes High Income Bond Fund II                               | _____% (217) TVST Touchstone Common Stock Fund   |
| _____% (150) Fidelity <sup>®</sup> VIP Contrafund <sup>®</sup> Portfolio             | _____% (219) TVST Touchstone Small Company Fund  |
| _____% (149) Fidelity <sup>®</sup> VIP Growth Opportunities Portfolio                | _____% (105) Virtus Duff & Phelps Real Estate Securities Series (A Shares)   |
| _____% (151) Fidelity <sup>®</sup> VIP Growth Portfolio                              | _____% (101) Virtus KAR Capital Growth Series (A Shares)   |
| _____% (206) Fidelity <sup>®</sup> VIP Investment Grade Bond Portfolio               | _____% (119) Virtus KAR Enhanced Core Equity Series (A Shares)   |
| _____% (227) Franklin DynaTech VIP Fund  | _____% (181) Virtus KAR Small-Cap Growth Series (A Shares)   |
| _____% (196) Franklin Income VIP Fund  | _____% (154) Virtus KAR Small-Cap Value Series (A Shares)  |
| _____% (121) Franklin Mutual Shares VIP Fund   | _____% (102) Virtus Newfleet Multi-Sector Intermediate Bond Series (A Shares)  |
| _____% (247) Invesco V.I. American Franchise Fund                                    | _____% (104) Virtus SGA International Growth Series (A Shares)   |
| _____% (199) Invesco V.I. Discovery Large Cap Fund                                   | _____% (103) Virtus Tactical Allocation Series   |
| _____% (205) Invesco V.I. Equity and Income Fund                                     | _____% Fixed Income Allocation - for Phoenix Income Choice only.   |
| _____% (200) Invesco V.I. Global Fund  | _____% Guaranteed Interest Account* (Not available for Phoenix Income Choice or Freedom Edge.)   |
| _____% (201) Invesco V.I. Main Street Small Cap Fund                                 | _____% Other: _____  |
| _____% (187) Lord Abbett Bond-Debenture Portfolio                                    |  |
| _____% (188) Lord Abbett Growth and Income Portfolio                                 |  |
| _____% (189) Lord Abbett Mid Cap Stock Portfolio                                     |  |
| _____% (245) Morningstar Aggressive Growth ETF Asset Allocation Portfolio (Class II) | * GIA limited to 5% for Dimensions, Spectrum Edge, Investor's Edge, Premium Edge, Flexible Retirement Choice. Restriction may vary by state. |
| _____% (238) Morningstar Balanced ETF Asset Allocation Portfolio (Class II)          |  |
| _____% (239) Morningstar Growth ETF Asset Allocation Portfolio (Class II)            |  |
| _____% (237) Morningstar Income and Growth ETF Asset Allocation Portfolio (Class II) |  |
| _____% (248) Neuberger Berman AMT Mid Cap Growth Portfolio, Class S                  |  |
| _____% (251) Neuberger Berman AMT Sustainable Equity Portfolio, Class S              |  |



Subsequent payments will be invested as indicated above unless the Company is otherwise instructed.

**Section 4: Signatures - Required**

Owner	<u>X</u> _____	_____	_____
		Print Name (and Title, Company if Corp Owned)	Date
Joint Owner (if any)	<u>X</u> _____	_____	_____
		Print Name (and Title, Company if Corp Owned)	Date

