



National Life Insurance Company®  
 Life Insurance Company of the Southwest™

**Transfer Request and Allocation Change  
for Multi-Account/Multi-Index Annuities**

Owner's Name \_\_\_\_\_

Policy/Certificate No.: \_\_\_\_\_

Address: (Street, City, State & Zip Code) \_\_\_\_\_

Social Security/Tax I.D. Number: \_\_\_\_\_

Telephone No.: \_\_\_\_\_

New address?

**Multi-Account/Multi-Index Annuities: (Not all options are available on all policies)**

**S&P 500®**

**Russell 2000®**

- Ending Index Rate Option 1 (003)
- Ending Index Rate Option 2 (008)
- Average Index (005)

- Ending Index Rate Option 1 (009)
- Ending Index Rate Option 2 (010)

Declared Interest Account (007)

**TRANSFER REQUEST (For existing amounts only.)** - Amounts can be transferred from any type of Interest Account to another type of Interest Account. **All transfers are effective on the contractual reset date (see policy form).** Transfers are made on a LIFO basis (Last In First Out). **Important Note:** Your written or verbal request for transfer must be received at least 14 days in advance of the reset date.

Please indicate the Interest Account Number (see above list) and dollar amount (\$) or percentage (%) to be transferred.

Check here if the transfer will apply to all reset dates

			Interest Account Number		Interest Account Number
Transfer \$ _____	or % _____	from _____		to _____	
Transfer \$ _____	or % _____	from _____		to _____	
Transfer \$ _____	or % _____	from _____		to _____	
Transfer \$ _____	or % _____	from _____		to _____	

**ALLOCATION CHANGE (Only applicable to future premiums. Not applicable to single premium products.)** - Once each Policy Year, you may change the allocation for future premiums. Your allocation must be in whole percentages. These new instructions will become effective on the date we receive them and will apply to premiums received on or after that date.

Please indicate the percentage (%) to be allocated to each Interest Account.

**Multi-Account/Multi-Index Annuities: (Not all options are available on all policies)**

<b>S&amp;P 500®</b>	<b>Russell 2000®</b>	
Ending Index Rate Option 1 (003) _____ %	Ending Index Rate Option 1 (009) _____ %	Declared Interest Account (007) _____ %
Ending Index Rate Option 2 (008) _____ %	Ending Index Rate Option 2 (010) _____ %	
Average Index (005) _____ %		

Signed at: (City & State) \_\_\_\_\_ this (mm/dd/yyyy) \_\_\_\_\_

Owner's Signature: \_\_\_\_\_

Joint Owner's Signature: \_\_\_\_\_

9100(0612)

National Life Group® is a trade name of National Life Insurance Company, Montpelier, VT, Life Insurance Company of the Southwest (LSW), Addison, TX and their affiliates. Each company of National Life Group is solely responsible for its own financial condition and contractual obligations. LSW is not an authorized insurer in New York and does not conduct insurance business in New York. Cat. No. 100518

P: 800-732-8939 | F: 214-638-9162 | Imaging@NationalLifeGroup.com | www.NationalLifeGroup.com  
 Centralized Mailing Address: One National Life Drive, Montpelier, VT 05604-5555