IUL – UNITED OF OMAHA
NEW MONEY ALLOCATION / EXISTING FUNDS TRANSFER REQUEST FORM

INSTRUCTIONS:
The policy number and the other details must be clearly indicated on this form, and appropriate information is to be entered for the item(s) to be changed. **In all cases, the form must be signed and dated, by the policy owner.**
In-order to process your request for the changes, we must receive this form 2 business days prior to the requested allocation date. Allocation and Transfer changes can be requested by completing and mailing this form to us or you may visit us at www.mutualofomaha.com and click on the "sign in" link.

POLICY INFORMATION:
Policy Number :____

Owner Full name:____Owner SSN/TIN: _______________________

Owner address :____Telephone:_________________________

NEW MONEY ALLOCATION CHANGE REQUEST:
Please change my current allocations as indicated below. Percentages must be in whole numbers and total 100%. These changes are for future allocations and will not be effective until this form is received and processed.
ALLOCATION DATE :____________________(Month and Year) Please note: If allocation date is not indicated, the changes will be effective the next processing date.
NOTE: Changes may only be requested for future allocations and the allocation date cannot be more than 18 months in the future.

_______________% FIXED INTEREST ACCOUNT

_______________% S&P 500® ONE YEAR 100% PARTICIPATION INDEX ACCOUNT[1]

_______________% S&P 500® ONE YEAR HIGH PARTICIPATION INDEX ACCOUNT[1]

_______________% S&P 500® ONE YEAR UNCAPPED INDEX ACCOUNT[1]

_______________% BofA U.S. Agility Index: ONE YEAR UNCAPPED INDEX ACCOUNT[2]

_______________% Total – **All percentages must be in a whole number and sum up to 100%**

POLICY OWNER'S SIGNATURE:____**DATE:** ______________

EXISTING FUNDS TRANSFER REQUEST:

Note: All future allocation payments will continue to use the existing allocation percentages. If you want your future allocations to be designated to the new strategy as listed in the existing funds transfer section, then please fill out the NEW MONEY ALLOCATION CHANGE REQUEST section. PLEASE NOTE: you could transfer the remaining balance out of an account and still have that account allocated for future "new" allocations. If not warranted, change your allocation percentage for that account to zero.

You may transfer amounts from the Fixed Interest Account to the Indexed Accounts at any point in time, effective on the next processing date. You may transfer amounts from the Indexed Accounts to the Fixed Interest Account or other Indexed Accounts on the segment maturity date only. There is no minimum transfer amount. Transfers can be requested in PERCENTAGE VALUE only.

ALLOCATION DATE :____________________(Month and Year) Please note: If the allocation date is not indicated, the changes will be effective the next processing date.

NOTE: Requests for any future transfers can be applicable to only open index account segments.

Transfer can be done to single Account or multiple Accounts:

From:

_________________________(FIXED INTEREST/ S&P 500® 1YEAR 100% PAR / S&P 500® 1YEAR HIGH PAR / S&P 500® 1 YEAR UNCAPPED / BofA U.S. Agility Index: 1 YEAR UNCAPPED)

To:

____________________________% FIXED INTEREST ACCOUNT

____________________________% S&P 500® 1YEAR 100% PARTICIPATION INDEX ACCOUNT[1]

____________________________% S&P 500® 1YEAR HIGH PARTICIPATION INDEX ACCOUNT[1]

____________________________% S&P 500® 1 YEAR UNCAPPED INDEX ACCOUNT[1]

____________________________% BofA U.S. Agility Index: 1 YEAR UNCAPPED INDEX ACCOUNT[2]

USE THIS SECTION FOR ADDITIONAL TRANSFER REQUESTS:

NOTE: The requests below will have the same allocation date as mentioned by you above in the EXISTING FUNDS TRANSFER REQUEST section. If you want the below transfers to be allocated on different date, you may have to complete a new form.

From:

_________________________(FIXED INTEREST/ S&P 500® 1YEAR 100% PAR / S&P 500® 1YEAR HIGH PAR / S&P 500® 1 YEAR UNCAPPED / BofA U.S. Agility Index: 1 YEAR UNCAPPED)

To:

____________________________% FIXED INTEREST ACCOUNT

____________________________% S&P 500® 1YEAR 100% PARTICIPATION INDEX ACCOUNT[1]

____________________________% S&P 500® 1YEAR HIGH PARTICIPATION INDEX ACCOUNT[1]

____________________________% S&P 500® 1 YEAR UNCAPPED INDEX ACCOUNT[1]

____________________________% BofA U.S. Agility Index: 1 YEAR UNCAPPED INDEX ACCOUNT[2]

From:

_________________________(FIXED INTEREST/ S&P 500® 1YEAR 100% PAR / S&P 500® 1YEAR HIGH PAR / S&P 500® 1 YEAR UNCAPPED / BofA U.S. Agility Index: 1 YEAR UNCAPPED)

To:

____________________________% FIXED INTEREST ACCOUNT

____________________________% S&P 500® 1YEAR 100% PARTICIPATION INDEX ACCOUNT[1]

____________________________% S&P 500® 1YEAR HIGH PARTICIPATION INDEX ACCOUNT[1]

____________________________% S&P 500® 1 YEAR UNCAPPED INDEX ACCOUNT[1]

____________________________% BofA U.S. Agility Index: 1 YEAR UNCAPPED INDEX ACCOUNT[2]

From:

_________________________(FIXED INTEREST/ S&P 500® 1YEAR 100% PAR / S&P 500® 1YEAR HIGH PAR / S&P 500® 1 YEAR UNCAPPED / BofA U.S. Agility Index: 1 YEAR UNCAPPED)

To:

____________________________% FIXED INTEREST ACCOUNT

____________________________% S&P 500® 1YEAR 100% PARTICIPATION INDEX ACCOUNT[1]

____________________________% S&P 500® 1YEAR HIGH PARTICIPATION INDEX ACCOUNT[1]

____________________________% S&P 500® 1 YEAR UNCAPPED INDEX ACCOUNT[1]

____________________________% BofA U.S. Agility Index: 1 YEAR UNCAPPED INDEX ACCOUNT[2]

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POLICY OWNER'S SIGNATURE:____**DATE:** ______________