

**A. ACCOUNT INFORMATION**

Contract Number	Owner's Name	Owner's Social Security Number
Owner's Phone Number	Agent's Phone Number	

The Phoenix Asset Rebalancing Program periodically readjusts your investment allocations by shifting money among investment options. By choosing this program your investment portfolio will be automatically adjusted to maintain the percentages you designate for specific accounts. To allocate funds outside of the asset rebalancing process, call our Customer Care Center at (800) 541-0171 or your financial advisor or agent.

**B. INVESTMENT OPTION SELECTIONS**

**Our fixed investment option, the Guaranteed Interest Account (GIA), is not available for asset rebalancing.**

Please indicate below the investment options you wish to have rebalanced and the percentages you wish to have in each investment option.

Investment Option Name	_____ %	Investment Option Name	_____ %
Investment Option Name	_____ %	Investment Option Name	_____ %
Investment Option Name	_____ %	Investment Option Name	_____ %
Investment Option Name	_____ %	Investment Option Name	_____ %
Investment Option Name	_____ %	Investment Option Name	_____ %
Investment Option Name	_____ %	Investment Option Name	_____ %
Investment Option Name	_____ %	Investment Option Name	_____ %
Investment Option Name	_____ %	Investment Option Name	_____ %
Investment Option Name	_____ %	Investment Option Name	_____ %
Investment Option Name	_____ %	Investment Option Name	_____ %
Investment Option Name	_____ %	Investment Option Name	_____ %
<b>Total Must Equal</b>			<b>100%</b>

**C. REBALANCE OPTIONS**

**One of the following MUST be checked. If neither box below is checked we will process as a full rebalance.**

Not available for Group Strategic Edge, Templeton Investment Plus. If you have elected an Asset Allocation Option (model), asset rebalancing will be active according to that option. (Models automatically rebalance.)

- Full Rebalance
  Partial Rebalance (List below all investment options in your current portfolio that you do not want to include in the rebalancing.)

**D. START DATE**
**Check one**

- Date Received in Good Order  
 Last Day of Frequency Period  
 Other Date \_\_\_\_\_

**E. FREQUENCY (See reverse for definitions of frequency.)**
**Frequency (Check one)**

- Monthly       Quarterly       Semi-Annually  
 Annually       One Time Only: \_\_\_\_\_  
 (One time only cannot be stopped once it is set up.)

**F. OWNER SIGNATURE(S)**

I authorize the commencement of Asset Rebalancing for my Phoenix annuity contract. This Asset Rebalancing program may be modified or terminated at any time by notifying Phoenix, either in writing or by phone. This authorization will remain in effect as long as my annuity contract is in force, unless I request to have the program terminated.

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

 \_\_\_\_\_  
 Joint Owner's Signature (if applicable)

 \_\_\_\_\_  
 Date

 \_\_\_\_\_  
 Date

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*Some of the accounts listed below may not be available in your state or for your product type.  
Please call the Customer Care Center at (800) 541-0171 for additional information.*

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(225) AB VPS Balanced Wealth Strategy Portfolio	(199) Oppenheimer Capital Appreciation Fund/VA
(229) Calvert VP S&P MidCap 400 Index Portfolio	(200) Oppenheimer Global Fund/VA
(167) Deutsche Equity 500 Index VIP	(201) Oppenheimer Main Street Small Cap Fund/VA <sup>®</sup>
(228) Deutsche Small Cap Index VIP	(202) PIMCO VIT CommodityRealReturn <sup>®</sup> Strategy Portfolio
(125) Federated Fund for U.S. Government Securities II	(203) PIMCO VIT Real Return Portfolio
(235) Federated Government Money Fund II (Service Shares)	(204) PIMCO VIT Total Return Portfolio
(126) Federated High Income Bond Fund II	(215) Sentinel Variable Products Balanced Fund
(150) Fidelity <sup>®</sup> VIP Contrafund <sup>®</sup> Portfolio	(216) Sentinel Variable Products Bond Fund
(149) Fidelity <sup>®</sup> VIP Growth Opportunities Portfolio	(217) Sentinel Variable Products Common Stock Fund
(151) Fidelity <sup>®</sup> VIP Growth Portfolio	(219) Sentinel Variable Products Small Company Fund
(206) Fidelity <sup>®</sup> VIP Investment Grade Bond Portfolio	(106) Templeton Developing Markets VIP Fund
(227) Franklin Flex Cap Growth VIP Fund	(111) Templeton Foreign VIP Fund
(196) Franklin Income VIP Fund	(107) Templeton Growth VIP Fund
(121) Franklin Mutual Shares VIP Fund	(104) Virtus Duff & Phelps International Series (A Shares)
(247) Invesco V.I. American Franchise Fund	(105) Virtus Duff & Phelps Real Estate Securities Series (A Shares)
(205) Invesco V.I. Equity and Income Fund	(101) Virtus KAR Capital Growth Series (A Shares)
(187) Lord Abbett Bond-Debenture Portfolio	(181) Virtus KAR Small-Cap Growth Series (A Shares)
(188) Lord Abbett Growth and Income Portfolio	(154) Virtus KAR Small-Cap Value Series (A Shares)
(189) Lord Abbett Mid Cap Stock Portfolio	(102) Virtus Newfleet Multi-Sector Intermediate Bond Series (A Shares)
(245) Morningstar Aggressive Growth ETF Asset Allocation Portfolio (Class II)	(119) Virtus Rampart Enhanced Core Equity Series (A Shares)
(238) Morningstar Balanced ETF Asset Allocation Portfolio (Class II)	(103) Virtus Strategic Allocation Series (A Shares)
(239) Morningstar Growth ETF Asset Allocation Portfolio (Class II)	(109) Wanger International
(237) Morningstar Income and Growth ETF Asset Allocation Portfolio (Class II)	(122) Wanger Select
(198) Neuberger Berman AMT Guardian Portfolio	(108) Wanger USA
(248) Neuberger Berman AMT Mid Cap Growth Portfolio, Class S	

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## **Frequency Definitions**

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Last Day of Frequency Period Dates:	<b>Monthly</b> - The last day of every month
	<b>Quarterly</b> - March 31st, June 30th, September 30th, December 31st
	<b>Semi-Annually</b> - June 30th and December 31st
	<b>Annually</b> - December 31st

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