NASSAU RE

Nassau Life and Annuity Company
Nassau Life Insurance Company
PHL Variable Insurance Company
Nassau Life and Annuity Insurance Company

PO Box 22012, Albany, NY 12201-2012
1-800-541-0171

Variable Annuity Allocation Transfer or Change

Case Number	Contract Number	Annuitant (Please print full name)

Address (No., Street, City, State, ZIP Code) Complete ONLY if change of address.

A. Transfer / Allocation of Values: Full percentages must be used and total 100%.

The Company (Note: As used in this form, the word Company means the company that issued the contract.) is hereby requested to:

☐ Transfer existing contract values as indicated in the table below.
☐ Change allocation schedule for future payments as indicated in the table below.

If a payment is enclosed:

☐ Apply payment according to my existing premium allocation schedule.
☐ Apply payment as indicated below. (Will **NOT** affect future premium allocations.)
☐ Change premium allocation schedule as indicated below for current and future payments. (**WILL** affect future premium allocations.)

Change allocation schedule for future payment as follows. (Do not use fractional percentages. Allocation below must total 100%.)

_____% (225) AB VPS Balanced Wealth Strategy Portfolio**
_____% (229) Calvert VP S&P Mid Cap 400 Index Portfolio
_____% (167) DWS Equity 500 Index VIP
_____% (228) DWS Small Cap Index VIP
_____% (125) Federated Fund for U.S. Government Securities II
_____% (235) Federated Government Money Fund II (Service Shares)
_____% (126) Federated High Income Bond Fund II
_____% (150) Fidelity® VIP Contrafund® Portfolio
_____% (149) Fidelity® VIP Growth Opportunities Portfolio
_____% (151) Fidelity® VIP Growth Portfolio
_____% (206) Fidelity® VIP Investment Grade Bond Portfolio
_____% (227) Franklin Flex Cap Growth VIP Fund**
_____% (196) Franklin Income VIP Fund
_____% (121) Franklin Mutual Shares VIP Fund
_____% (199) Invesco Oppenheimer V.I. Capital Appreciation Fund
_____% (200) Invesco Oppenheimer V.I. Global Fund
_____% (201) Invesco Oppenheimer V.I. Main Street Small Cap Fund
_____% (247) Invesco V.I. American Franchise Fund
_____% (205) Invesco V.I. Equity and Income Fund
_____% (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)
_____% (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
_____% (202) PIMCO VIT CommodityRealReturn®Strategy Portfolio
_____% (203) PIMCO VIT Real Return Portfolio
_____% (204) PIMCO VIT Total Return Portfolio
_____% (106) Templeton Developing Markets VIP Fund
_____% (111) Templeton Foreign VIP Fund
_____% (107) Templeton Growth VIP Fund
_____% (215) TVST Touchstone Balanced Fund
_____% (216) TVST Touchstone Bond Fund
_____% (217) TVST Touchstone Common Stock Fund
_____% (219) TVST Touchstone Small Company Fund
_____% (105) Virtus Duff & Phelps Real Estate Securities Series (A Shares)
_____% (101) Virtus KAR Capital Growth Series (A Shares)
_____% (181) Virtus KAR Small-Cap Growth Series (A Shares)
_____% (154) Virtus KAR Small-Cap Value Series (A Shares)
_____% (102) Virtus Newfleet Multi-Sector Intermediate Bond Series (A Shares)
_____% (119) Virtus Rampart Enhanced Core Equity Series (A Shares)
_____% (104) Virtus SGA International Growth Series (A Shares)
_____% (103) Virtus Strategic Allocation Series (A Shares)
_____% (109) Wanger International
_____% (122) Wanger Select
_____% (108) Wanger USA
_____% Guaranteed Interest Account* *(Not available for Phoenix Income Choice or Freedom Edge.)*
_____% Other: ____

* GIA limited to 5% for Dimensions, Phoenix Spectrum Edge, Investor's Edge, Premium Edge. Restriction may vary by state. GIA not available for Phoenix Income Choice or Phoenix Freedom Edge.

** Not available with Spectrum Edge+.

IMPORTANT ADDITIONAL INFORMATION

- You may make only one transfer per contract year from the GIA. The amount that may be transferred from the GIA at any one time cannot exceed the greater of $1000 or 25% of the contract value in the GIA.

IMPORTANT: A transfer does not automatically change your investment option allocation for future payments. If you wish to change the allocation for future payments, complete Part B on page 2.

NOTE: Certain limits and restrictions may apply to transfers - see your contract for details.

B. Election of Method for Payment of $35.00 Annual Administrative Charge. (Complete only if you wish to change your current payment method.)

☐ Charge paid in cash (checks accepted only, made payable to Nassau Re.)
☐ Charge deducted automatically from sub-account(s) on policy anniversary.

C. Election of Investment Programs (Complete only if you wish to change your current election.)

☐ Check-o-matic $ Amount______________________ ☐ Cancel my participation in Check-o-matic effective ________________________
Date

NY RESIDENTS ONLY

Please check one of the following boxes (If none checked we will assume the transaction related to this request was not based on a recommendation).

☐ The transaction related to this request was not based on a recommendation by my insurance producer.
☐ The transaction related to this request was based on a recommendation by my insurance producer. I have been informed of the relevant features of this transaction and the potential consequences of this request, both favorable and unfavorable.

D. Signature

Signed At	Date
Owner+	Assignee+

\+ If the owner and/or assignee is a corporation or bank, their complete corporate name(s) must appear above their signature line and this form must be signed by an officer of said corporation(s) with the officer's corporate title indicated.