



PAY INSTRUCTION CHANGE FOR MGA, AGA, PRODUCER GROUP OR PRODUCER

Step 1: Insert name of Producer/Agency to receive commissions and/or overrides

Name: _____ Code: _____

☐ MGA name: _____ MGA # _____

☐ AGA name: _____ AGA # _____

☐ Producer Group name: _____ Producer Group # _____

Step 2: Choose **ONLY ONE** payment option:

☐ Pay Producer commissions and overrides as allocated below

Or

☐ Pay Producer commissions **ONLY** as allocated below, overrides to ☐ MGA ☐ AGA ☐ Producer Group

Or

☐ Pay all commissions and overrides to ☐ MGA ☐ AGA ☐ Producer Group

COMMISSION AND OVERRIDE ALLOCATION

Step 3: Pay Producer Commission On: (see note 1)

First Year Life, including CI ☐ Yes ☐ No

Payout Annuity ☐ Yes ☐ No

Pivotal No Load & Pivotal DSC ☐ Yes ☐ No

Guaranteed Interest Account ☐ Yes ☐ No

Life & CI Renewal ☐ Yes ☐ No

Step 4: Pay Producer Override On (see notes 1&2)

First year life, including CI _____%

Payout Annuity _____%

Pivotal No Load & Pivotal DSC _____%

Guaranteed Interest Account _____%

Life & Health Service Fees and
Final Protection Service Fees
(policies settled prior to July 2, 2014) _____%

Living Protection Service Fees and
Final Protection Service Fees
(policies settled on or after July 2, 2014) _____%

Note 1: The override rate credited to the MGA Account as applicable will be the difference between the total override rate for the MGA and the override rate you instruct us to credit the agency and Producer.

Note 2: Override % indicated is actual % of commission amount credited to the Producer, and Service Fees % indicated is actual % of premium.

Step 5: (Optional)

Transfer Producer's pay to Producer code: _____. Please ensure steps 1-4 have also been completed.

Insert Name of MGA/AGA/Producer Group (Agency from Step 1)

Signature _____ Date _____ Name _____