



This sample document is intended to provide you with a broader knowledge of the performance of the allocation options that were available over the past contract year. It is intended to serve as a resource for you as you continue to support your client throughout the life of the contract. This document does not reflect how your client was allocated over the past contract year and it does not intend to show your client's actual contract performance.

**The interest rates presented below do not reflect:**

1. Any interest bonus or accumulation value factors that may apply;
2. Any rider charges and product fees that may apply; and
3. Any index lock that may have been exercised during the contract year, if applicable.

**Agent Addendum Sample**

Anniversary Date **6/26/2026**

Index performance for contract year beginning June 26, 2025 and ending June 25, 2026

**Monthly Sum Allocations**

| Date                               | S&P 500 Index |              |                                 |
|------------------------------------|---------------|--------------|---------------------------------|
|                                    | Index value   | Index change | Cap* Capped change <sup>1</sup> |
| 6/25/2025                          | 6,092.16      |              | 1.60%                           |
| 7/25/2025                          | 6,388.64      | 4.867%       | 1.60%                           |
| 8/25/2025                          | 6,439.32      | 0.793%       | 0.79%                           |
| 9/25/2025                          | 6,604.72      | 2.569%       | 1.60%                           |
| 10/25/2025                         | 6,791.69      | 2.831%       | 1.60%                           |
| 11/25/2025                         | 6,765.88      | -0.380%      | -0.38%                          |
| 12/25/2025                         | 6,932.05      | 2.456%       | 1.60%                           |
| 1/25/2026                          | 6,915.61      | -0.237%      | -0.24%                          |
| 2/25/2026                          | 6,946.13      | 0.441%       | 0.44%                           |
| 3/25/2026                          | 6,591.90      | -5.100%      | -5.10%                          |
| 4/25/2026                          | 7,165.08      | 8.695%       | 1.60%                           |
| 5/25/2026                          | 7,473.47      | 4.304%       | 1.60%                           |
| 6/25/2026                          | 7,357.49      | -1.552%      | -1.55%                          |
| Sum of capped changes <sup>1</sup> |               |              | <b>3.57%</b>                    |
| Credited interest rate             |               |              | <b>3.57%</b>                    |

<sup>1</sup>Monthly caps apply to positive monthly changes, but not to negative monthly changes.

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## Annual point-to-point, 1-year highest daily value, and 1-year performance trigger allocations

| Annual Point-to-Point Allocations           |  | 6/25/2025           | 6/25/2026          |                           |              |            |                           |                              |                        |
|---------------------------------------------|--|---------------------|--------------------|---------------------------|--------------|------------|---------------------------|------------------------------|------------------------|
|                                             |  | Initial index value | Ending index value | Highest Daily Index Value | Index change | Annual cap | Annual participation Rate | Annual trigger interest rate | Credited interest rate |
| Index                                       |  |                     |                    |                           |              |            |                           |                              |                        |
| S&P 500 Index                               |  | 6,092.16            | 7,357.49           | N/A                       | 20.77%       | 4.75%      | N/A                       | N/A                          | 4.75%                  |
| S&P 500 Index                               |  | 6,092.16            | 7,357.49           | N/A                       | 20.77%       | N/A        | N/A                       | 4.00%                        | 4.00%                  |
| Bloomberg US Dynamic Balance Index III ER   |  | 167.24              | 177.50             | 179.81                    | 7.52%        | N/A        | 52.00%                    | N/A                          | 3.91%                  |
| Bloomberg US Dynamic Balance Index III ER   |  | 167.24              | 177.50             | N/A                       | 6.14%        | N/A        | 95.00%                    | N/A                          | 5.83%                  |
| S&P 500 Futures Index ER                    |  | 505.71              | 590.78             | N/A                       | 16.82%       | N/A        | 35.00%                    | N/A                          | 5.89%                  |
| PIMCO Tactical Balanced Index ER            |  | 242.82              | 253.25             | N/A                       | 4.30%        | N/A        | 90.00%                    | N/A                          | 3.87%                  |
| Morgan Stanley Strategic Trends 10 ER Index |  | 591.49              | 657.56             | N/A                       | 11.17%       | N/A        | 55.00%                    | N/A                          | 6.14%                  |

## BLENDED FUTURES INDEX

| Blended Futures Index                                  |        | 6/25/2025           | 6/25/2026          |              |                       |                           |                        |  |
|--------------------------------------------------------|--------|---------------------|--------------------|--------------|-----------------------|---------------------------|------------------------|--|
| Index                                                  | Weight | Initial index value | Ending index value | Index change | Weighted index change | Annual participation Rate | Credited interest rate |  |
| S&P 500 Futures Index ER                               | 30%    | 505.71              | 590.78             | 16.82%       | 5.05%                 |                           |                        |  |
| Bloomberg International Equity Custom Futures ER Index | 10%    | 189.47              | 221.47             | 16.88%       | 1.69%                 |                           |                        |  |
| Bloomberg US 10yr Note Custom Futures ER Index         | 40%    | 114.52              | 113.13             | -1.21%       | -0.48%                |                           |                        |  |
| Bloomberg US Small Cap Custom Futures ER Index         | 20%    | 294.35              | 402.84             | 36.86%       | 7.37%                 |                           |                        |  |
| <b>Blended Futures Index</b>                           |        |                     |                    |              | <b>13.62%</b>         | <b>45.00%</b>             | <b>6.13%</b>           |  |

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There is potential for volatility-controlled indexes to underperform compared against benchmark indexes.

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