

**PACIFIC LIFE INSURANCE COMPANY**

Life Insurance Division  
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**INDEXED PRODUCTS TRANSFER REQUEST – IUL**

For Indexed Universal Life Insurance

Insured's Name: First MI Last	Policy Number (if available)
Policyowner's Name	Phone Number (include area code)

**IMPORTANT INFORMATION**

- This request must be received before 1:00 PM Pacific time and at least two business days prior to the transfer date for the transfer to be effective the next available transfer date.
- The completion of any of the sections below supersedes any previous instructions on file with Pacific Life Insurance Company (PLIC). If any of the fields on this form are left blank, no change will be made to the current instructions on file with PLIC.
- Refer to your policy contract specification page and the chart below to identify product and indexed account availability.

Product Type	Product Name	Available Indexed Accounts
Equity Indexed Universal Life	Pacific Indexed Accumulator (PIA) Pacific Indexed Accumulator II (PIA2)	Indexed Account
Indexed Universal Life	Pacific Indexed Accumulator III (PIA3)	1 Year Indexed Account
	Pacific Indexed Accumulator IV (PIA4)	1 Year Indexed Account 2 (1-Year International Indexed Account)
	Pacific Indexed Accumulator 5 (PIA 5)	1 Year Indexed Account 3 (1-Year High Par Indexed Account)
	Pacific Indexed Performer LT (PIP LT)	1 Year Indexed Account 4 (1-Year No Cap Indexed Account) <sup>4</sup>
Indexed Universal Life	Pacific Indexed Performer LT 2 (PIP LT 2)	1 Year Indexed Account 5 (1-Year High Cap Indexed Account) <sup>1,3</sup>
	Pacific Indexed Protector (PIA Pro 2)	2 Year Indexed Account
	Pacific Discovery Protector - IUL (PDP IUL)	5 Year Indexed Account <sup>2</sup>
	Pacific Discovery Xelerator IUL (PDX IUL)	5 Year Indexed Account 2 (High Par 5-Year Indexed Account) <sup>3,4</sup>
	Indexed Pacific Estate Preserver (IPEP)	
	Indexed Pacific Estate Preserver 2 (IPEP 2)	
	Pacific Prime IUL	1 Year Indexed Account 1 Year Indexed Account 2 (1-Year International Indexed Account) 1 Year Indexed Account 3 (1-Year High Par Indexed Account)
	PIA Protector (PIA PRO)	1 Year Indexed Account 1 Year Indexed Account 3 (1-Year High Par Indexed Account)

**1. ONE-TIME TRANSFER FROM FIXED ACCOUNT TO INDEXED ACCOUNT(S)**

Transfer \$ \_\_\_\_\_ or \_\_\_\_\_ % from the Fixed Account to the Indexed Account(s) selected below:

- |   |   |
|---|---|
| _____ % to the 1 Year Indexed Account                         | _____ % to the 2 Year Indexed Account                         |
| _____ % to the 1 Year International Indexed Account           | _____ % to the 5 Year Indexed Account <sup>2</sup>            |
| _____ % to the 1 Year High Par Indexed Account                | _____ % to the High Par 5 Year Indexed Account <sup>3,4</sup> |
| _____ % to the 1 Year No Cap Indexed Account <sup>4</sup>     | _____ % to the Indexed Account (PIA & PIA2 only)              |
| _____ % to the 1 Year High Cap Indexed Account <sup>1,3</sup> |   |

**Total: \_\_\_\_\_ % MUST EQUAL 100%**

<sup>1</sup>An Indexed Account Charge Rate of 0.0666% is assessed against any Account Value in the 1 Year High Cap Indexed Account. The resulting charge is taken as part of the monthly deduction. Please see your Policy for details.

<sup>2</sup>For PIA3 and IPEP – Pennsylvania only

<sup>3</sup>Not approved in Pennsylvania for PIA3 and IPEP

<sup>4</sup>Not available for PDP IUL



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## 2. PIA & PIA2 ONLY: ONE-TIME TRANSFER FROM INDEXED ACCOUNT TO FIXED ACCOUNT ON SEGMENT ANNIVERSARY

Transfer \$ \_\_\_\_\_ or \_\_\_\_\_ % from the Indexed Account to the Fixed Account. The transfer will occur on the next Segment Anniversary.

Apply to:  All Segments  Specific Segment Anniversary date(s)\*: \_\_\_\_\_ (mm/dd/yyyy)

A transfer from the Indexed Account to the Fixed Account will prevent future transfers to the Indexed Account for a 12-month period of time called the Lockout period. During this time, any payments will remain in the Fixed Account, and no transfer to the Indexed Account may take place, including a transfer as a result of a premium payment. Transfers to the Indexed Account can resume after the end of the Lockout period.

\*Note: We will deduct transfer amounts proportionately from all Segments with the same Segment Anniversary dates.

## 3. PAYMENT TRANSFERS AFTER PREMIUM PAYMENT AND/OR LOAN REPAYMENT

Complete this section to change the amount<sup>5</sup> to be automatically transferred from the Fixed Account to the Indexed Account(s) selected below on the next transfer date.

Percentages below must be in whole numbers. The sum of the percentages must equal 100%. Actual transfer amounts will be limited to the balance in the Fixed Account as of the transfer date.

_____ % to the Fixed Account	_____ % to the 1 Year High Cap Indexed Account <sup>1,3</sup>
_____ % to the 1 Year Indexed Account	_____ % to the 2 Year Indexed Account
_____ % to the 1 Year International Indexed Account	_____ % to the 5 Year Indexed Account <sup>2</sup>
_____ % to the 1 Year High Par Indexed Account	_____ % to the High Par 5 Year Indexed Account <sup>3,4</sup>
_____ % to the 1 Year No Cap Indexed Account <sup>4</sup>	_____ % to the Indexed Account (PIA & PIA2 only)
<b>Total: _____ % MUST EQUAL 100%</b>	

**Cancel Payment Transfer Instructions.**

<sup>1</sup>An Indexed Account Charge Rate of 0.0666% is assessed against any Account Value in the 1 Year High Cap Indexed Account. The resulting charge is taken as part of the monthly deduction. Please see your Policy for details.

<sup>2</sup>For PIA3 and IPEP – Pennsylvania only

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<sup>5</sup>The amount automatically transferred is the lesser of: 1) your selected transfer percentage multiplied by all premium payments and loan repayments paid since the last transfer date; and 2) the balance of the Fixed Account as of the applicable transfer date.

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## 4. SCHEDULED INDEXED TRANSFER (SIT) FROM FIXED ACCOUNT TO INDEXED ACCOUNT(S)

Complete this section to request scheduled indexed transfers from the Fixed Account to the Indexed Account(s) selected below on the next applicable transfer date. This request supersedes any existing schedule. Only one SIT is allowed at any time.

### i. Transfer Amount: Choose Option A or B (Required)

- Option A** I would like to transfer \$ \_\_\_\_\_ on each transfer date
- Option B** I would like Pacific Life to calculate the transfer amount.

Pacific Life will leave an amount in the Fixed Account to cover estimated monthly charges for the next 12-month period. The transfer amount is determined after subtracting estimated monthly charges for the next 12 months from the Fixed Account at the time of SIT enrollment. Contact us at any time to have the transfer amount recalculated based on the current monthly charges since the transfer amount will not automatically recalculate.

### ii. Transfer To: Which Indexed Account(s) do you want to transfer into? (Required)

- |   |   |
|---|---|
| _____ % to the 1 Year Indexed Account                         | _____ % to the 2 Year Indexed Account                         |
| _____ % to the 1 Year International Indexed Account           | _____ % to the 5 Year Indexed Account <sup>2</sup>            |
| _____ % to the 1 Year High Par Indexed Account                | _____ % to the High Par 5 Year Indexed Account <sup>3,4</sup> |
| _____ % to the 1 Year No Cap Indexed Account <sup>4</sup>     | _____ % to the Indexed Account (PIA & PIA2 only)              |
| _____ % to the 1 Year High Cap Indexed Account <sup>1,3</sup> |   |
| <b>Total: _____ % MUST EQUAL 100%</b>                         |   |

### iii. Frequency of Transfers: How often do you want transfers to occur? If none is selected, default is monthly.

- Monthly       Quarterly

### iv. Transfer Duration: How long do you want transfers to occur? If none is selected, default is no end date.

- No End Date       End after \_\_\_\_\_ # of transfers (**A new SIT request is required to continue SIT after end date.**)

### v. Cancel Scheduled Indexed Transfer

- Check here to cancel current transfer schedule

### **IMPORTANT INFORMATION:**

- If you have provided previous instructions to allocate 100% of your payments to the Indexed Account(s), then a SIT may not be applicable. The existing payment transfer instructions will automatically transfer your payments from the Fixed Account into the Indexed Account(s) on the next applicable transfer date.
- SIT may not be applicable if modal payment frequency is monthly EFT.
- If no end date is selected transfers will continue as long as there are funds in the Fixed Account. If the Fixed Account is depleted, transfers will restart once funds are deposited into the Fixed Account.
- The transfer amount will not automatically recalculate.
- The actual number of transfers may vary due to loans, withdrawals, premium payments, loan repayments, monthly charges and interest credits.

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## 5. SEGMENT MATURITY REALLOCATION

Complete this section to reallocate the Segment Maturity Value to new segment(s).

**Important: If there is an Alternate Loan on your policy, Segment Maturity Reallocation limitations may apply. Please review the Alternate Loan Rider in your policy or contact your Life Insurance Producer or Customer Service for information.**

Check here if you would like all matured segments for the Indexed Account(s) listed below to be allocated to the Fixed Account.

1 Year (Yr) Indexed Account	1 Year (Yr) No Cap Indexed Account
Transfer _____ % to 1 Yr Indexed Account	Transfer _____ % to 1 Yr Indexed Account
Transfer _____ % to 1 Yr International Indexed Account	Transfer _____ % to 1 Yr International Indexed Account
Transfer _____ % to 1 Yr High Par Indexed Account	Transfer _____ % to 1 Yr High Par Indexed Account
Transfer _____ % to 1 Yr No Cap Indexed Account <sup>4</sup>	Transfer _____ % to 1 Yr No Cap Indexed Account <sup>4</sup>
Transfer _____ % to 1 Yr High Cap Indexed Account <sup>1,3</sup>	Transfer _____ % to 1 Yr High Cap Indexed Account <sup>1,3</sup>
Transfer _____ % to 2 Yr Indexed Account	Transfer _____ % to 2 Yr Indexed Account
Transfer _____ % to 5 Yr Indexed Account <sup>2</sup>	Transfer _____ % to 5 Yr Indexed Account <sup>2</sup>
Transfer _____ % to High Par 5 Year Indexed Account <sup>3,4</sup>	Transfer _____ % to High Par 5 Year Indexed Account <sup>3,4</sup>
Transfer _____ % to Fixed Account	Transfer _____ % to Fixed Account
<b>Total: _____ % MUST EQUAL 100%</b>	<b>Total: _____ % MUST EQUAL 100%</b>
1 Year (Yr) International Indexed Account	1 Year (Yr) High Cap Indexed Account
Transfer _____ % to 1 Yr Indexed Account	Transfer _____ % to 1 Yr Indexed Account
Transfer _____ % to 1 Yr International Indexed Account	Transfer _____ % to 1 Yr International Indexed Account
Transfer _____ % to 1 Yr High Par Indexed Account	Transfer _____ % to 1 Yr High Par Indexed Account
Transfer _____ % to 1 Yr No Cap Indexed Account <sup>4</sup>	Transfer _____ % to 1 Yr No Cap Indexed Account <sup>4</sup>
Transfer _____ % to 1 Yr High Cap Indexed Account <sup>1,3</sup>	Transfer _____ % to 1 Yr High Cap Indexed Account <sup>1,3</sup>
Transfer _____ % to 2 Yr Indexed Account	Transfer _____ % to 2 Yr Indexed Account
Transfer _____ % to 5 Yr Indexed Account <sup>2</sup>	Transfer _____ % to 5 Yr Indexed Account <sup>2</sup>
Transfer _____ % to High Par 5 Year Indexed Account <sup>3,4</sup>	Transfer _____ % to High Par 5 Year Indexed Account <sup>3,4</sup>
Transfer _____ % to Fixed Account	Transfer _____ % to Fixed Account
<b>Total: _____ % MUST EQUAL 100%</b>	<b>Total: _____ % MUST EQUAL 100%</b>
1 Year (Yr) High Par Indexed Account	2 Year (Yr) Indexed Account
Transfer _____ % to 1 Yr Indexed Account	Transfer _____ % to 1 Yr Indexed Account
Transfer _____ % to 1 Yr International Indexed Account	Transfer _____ % to 1 Yr International Indexed Account
Transfer _____ % to 1 Yr High Par Indexed Account	Transfer _____ % to 1 Yr High Par Indexed Account
Transfer _____ % to 1 Yr No Cap Indexed Account <sup>4</sup>	Transfer _____ % to 1 Yr No Cap Indexed Account <sup>4</sup>
Transfer _____ % to 1 Yr High Cap Indexed Account <sup>1,3</sup>	Transfer _____ % to 1 Yr High Cap Indexed Account <sup>1,3</sup>
Transfer _____ % to 2 Yr Indexed Account	Transfer _____ % to 2 Yr Indexed Account
Transfer _____ % to 5 Yr Indexed Account <sup>2</sup>	Transfer _____ % to 5 Yr Indexed Account <sup>2</sup>
Transfer _____ % to High Par 5 Year Indexed Account <sup>3,4</sup>	Transfer _____ % to High Par 5 Year Indexed Account <sup>3,4</sup>
Transfer _____ % to Fixed Account	Transfer _____ % to Fixed Account
<b>Total: _____ % MUST EQUAL 100%</b>	<b>Total: _____ % MUST EQUAL 100%</b>

(Continued...)

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5 Year (Yr) Indexed Account	High Par 5 Year (Yr) Indexed Account
Transfer _____ % to 1 Yr Indexed Account	Transfer _____ % to 1 Yr Indexed Account
Transfer _____ % to 1 Yr International Indexed Account	Transfer _____ % to 1 Yr International Indexed Account
Transfer _____ % to 1 Yr High Par Indexed Account	Transfer _____ % to 1 Yr High Par Indexed Account
Transfer _____ % to 1 Yr No Cap Indexed Account <sup>4</sup>	Transfer _____ % to 1 Yr No Cap Indexed Account <sup>4</sup>
Transfer _____ % to 1 Yr High Cap Indexed Account <sup>1,3</sup>	Transfer _____ % to 1 Yr High Cap Indexed Account <sup>1,3</sup>
Transfer _____ % to 2 Yr Indexed Account	Transfer _____ % to 2 Yr Indexed Account
Transfer _____ % to 5 Yr Indexed Account <sup>2</sup>	Transfer _____ % to 5 Yr Indexed Account <sup>2</sup>
Transfer _____ % to High Par 5 Year Indexed Account <sup>3,4</sup>	Transfer _____ % to High Par 5 Year Indexed Account <sup>3,4</sup>
Transfer _____ % to Fixed Account	Transfer _____ % to Fixed Account
<b>Total: _____ % MUST EQUAL 100%</b>	<b>Total: _____ % MUST EQUAL 100%</b>
Indexed Account (PIA & PIA2 only)	
Transfer _____ % to Indexed Account	
Transfer _____ % to Fixed Account	
<b>Total: _____ % MUST EQUAL 100%</b>	

**REMARKS** (Use remarks section for additional detail or clarification.)

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