

**PACIFIC LIFE INSURANCE COMPANY**

Life Insurance Division  
 P.O. Box 2030 • Omaha, NE 68103-2030  
 (800) 347-7787 • Fax (866) 398-0467  
 www.PacificLife.com • Transactions@pacificlife.com



**INDEXED PRODUCTS TRANSFER – PACIFIC DISCOVERY XELERATOR IUL (PDX)**

For Indexed Universal Life Insurance – PDX IUL and PDX2 IUL Products

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.

**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 1 Year High Par Vol Ctrl Indexed Account |
| _____ % to the 1 Year International Indexed Account         | _____ % to the 1 Year Select Vol Ctrl Indexed Account   |
| _____ % to the 1 Year High Par Indexed Account              | _____ % to the 2 Year Indexed Account                   |
| _____ % to the 1 Year No Cap Indexed Account                | _____ % to the High Par 5 Year Indexed Account          |
| _____ % to the 1 Year High Cap Indexed Account <sup>1</sup> |   |

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

**2. Payment Transfers after Premium Payment and/or Loan Repayment**

Complete this section to change the amount<sup>2</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</sup> |
| _____ % to the 1 Year Indexed Account               | _____ % to the 1 Year High Par Vol Ctrl Indexed Account     |
| _____ % to the 1 Year International Indexed Account | _____ % to the 1 Year Select Vol Ctrl Indexed Account       |
| _____ % to the 1 Year High Par Indexed Account      | _____ % to the 2 Year Indexed Account                       |
| _____ % to the 1 Year No Cap Indexed Account        | _____ % to the High Par 5 Year Indexed Account              |

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

**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> 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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Insured's Name: First _____ MI _____ Last _____	Policy Number (if available) _____
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**3. 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 1 Year High Par Vol Ctrl Indexed Account |
| _____ % to the 1 Year International Indexed Account         | _____ % to the 1 Year Select Vol Ctrl Indexed Account   |
| _____ % to the 1 Year High Par Indexed Account              | _____ % to the 2 Year Indexed Account                   |
| _____ % to the 1 Year No Cap Indexed Account                | _____ % to the High Par 5 Year Indexed Account          |
| _____ % to the 1 Year High Cap Indexed Account <sup>1</sup> |   |

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

**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 the 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.
- If Option B is selected:
  - The calculation is based on the Fixed Account balance at the time the request is processed.
  - If No End Date is selected as the duration, the transfer amount will not be recalculated when subsequent premium is received.
  - A new request must be received to recalculate the transfer amount.
- The actual number of transfers may vary due to loans, withdrawals, premium payments, loan repayments, monthly charges and interest credits.

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

(Continued...)

<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.

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**4. Segment Maturity Reallocation (Continued)**

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