



Your Annuity Statement Has a New Look

We've updated the design of your annuity statement to make it easier to read and understand. You're seeing the refreshed format in the statement included in this mailing. Your contract features, values, and how your annuity works remain the same.

What's changing:

- A more modern layout
- A simplified color palette for improved readability
- Clearer labels and more organized sections
- Portrait orientation for a smoother reading experience

Our goal is to present your information in a clearer, more intuitive format so you can easily find the details that matter most.

If you have questions as you review your statement, your agent or our customer service team will be ready to assist.

Thank you for choosing National Life Group.

Sincerely,
National Life Group

TC8674825(1225)3

National Life Group® is a trade name representing various affiliates, which offer a variety of financial service products.
Centralized Mailing Address: One National Life Drive, Montpelier, VT 05604 | www.NationalLifeGroup.com

How to Read the Annuity Statement

This section provides an overview of your guaranteed income benefit (if applicable) and a snapshot of your current account values.

How to read the Annuity Statement — Page 1

1 Customer Profile & Policy Information

This area lists your personal information and the key details about your annuity. It includes your name and mailing address for verification, along with:

- **Statement Period:** The start and end dates covered by this statement.
- **Policy Number:** The unique number assigned to your annuity.
- **Plan:** The type of plan.
- **Product Name:** The specific annuity product you own.
- **Benefits:** Any key benefits or riders associated with your annuity.
- **Issue Date:** The date your annuity was issued.

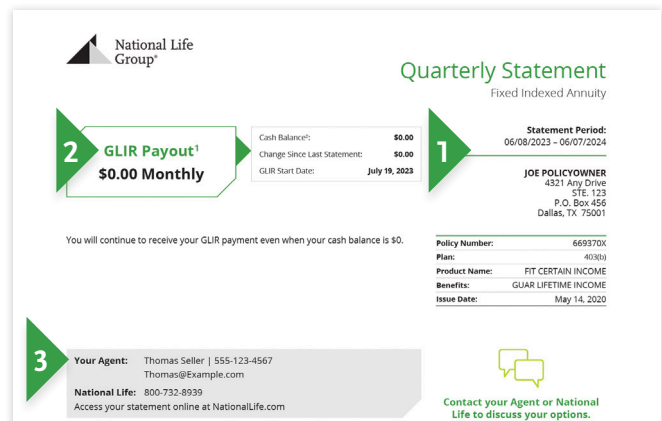
2 Key Account Values

Summary of your account activity for the period:

- **GLIR Payout:** This box shows Your Guaranteed Lifetime Income Rider (GLIR) monthly payout amount.
- **Cash Balance:** The gross value of your annuity at the end of the statement period.
- **Change Since Last Statement:** How your account value has increased or decreased during the statement period.
- **GLIR Start Date:** Date your Guaranteed Lifetime Income Rider (GLIR) payments began.

3 Agent and Service Contact Information

- Your agent's name, phone number, and email address
- National Life Group's customer service phone number
- The website address where you can access your statement online



National Life Group®

Quarterly Statement
Fixed Indexed Annuity

2 GLIR Payout¹
\$0.00 Monthly

Cash Balance²:	\$0.00
Change Since Last Statement:	\$0.00
GLIR Start Date:	July 19, 2023

1

Statement Period:
06/08/2023 – 06/07/2024

JOE POLICYOWNER
4321 Any Drive
STE. 123
P.O. Box 456
Dallas, TX 75001

You will continue to receive your GLIR payment even when your cash balance is \$0.

3

Your Agent: Thomas Seller | 555-123-4567
Thomas@Example.com

National Life: 800-732-8939
Access your statement online at NationalLife.com

Policy Number: 669370X
Plan: 403(b)
Product Name: FIT CERTAIN INCOME
Benefits: GLIR LIFETIME INCOME
Issue Date: May 14, 2020

Contact your Agent or National Life to discuss your options.

Products issued by
National Life Insurance Company®
Life Insurance Company of the Southwest®

How to read the Annuity Statement — Page 2

4 Cash Balance

The gross value of your annuity at the end of the statement period.

5 Death Benefit

This is the amount beneficiaries will receive if the annuitant passes away. It helps you understand the protection your annuity provides to those you name as beneficiaries.

6 Surrender Value

This is the amount you can withdraw if you choose to surrender your contract, minus any applicable charges or taxes.

7 Statement Period Details

This table summarizes all activity within the statement period, including:

- **Beginning Value:** Your account value at the start of the period
- **Credited Interest:** Interest earned during the period
- **Withdrawals:** Any amounts taken out
- **GLIR Charge (if applicable):** The cost of the Guaranteed Lifetime Income Rider
- **Ending Value:** Your account value at the end of the period

4 Cash Balance²
The current balance of your account. **\$0.00**

5 Death Benefit⁵
The amount your beneficiaries receive should the annuitant pass away. **\$0.00**

6 Surrender Value⁷
The total amount you can withdraw, minus any additional charges or taxes. **\$0.00**
Zero is your hero. With 0% floor, your policy offers protection when the index is down.

7 STATEMENT PERIOD DETAILS⁶

Beginning Value (06/06/2023)	\$0.00
Credited Interest ⁸	\$0.00
Withdrawals ⁹	\$0.00
GLIR Charge	\$0.00
Ending Value (06/07/2024)	\$0.00

ALLOCATIONS¹⁰

	FUTURE	CURRENT
SAP 500 Monthly Sum	0.00%	\$0.00

Protect Your Assets
You've worked too hard saving for your retirement only to spend those dollars on an unexpected illness or death. Consider protecting your future with a life insurance policy.
Call your agent for more information.
Thomas Seller
555-123-4567

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