



# Annuity Statement

January 01, 2023 - March 31, 2023

● **Statement date** 03/31/2023 Page 1 of 2

● **Annuitant**

MC FARLAND, SUSAN M

● **Contract information**

Number 0506489580  
Plan type 403(b)  
Annuitant/Employee  
Issue date 07/19/1994

● **Contacting Horace Mann**

Home Office Horace Mann Life Insurance Company  
1 Horace Mann Plaza  
Springfield, IL 62715-0001  
Your agent CRAGER, JOHN BARON  
Agent phone 727-497-7701  
To report a claim 800-999-1030  
Customer Care 800-999-1030  
On the Web [horacemann.com](http://horacemann.com)

● **Account value**

As of 03/31/2023 \$117,975.85

● **\*Your rate of return for the quarter is**

5.41%

● **Information from Horace Mann**

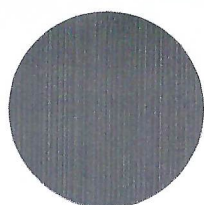
**Experience going paperless**

Accessing your annuity documents online has never been easier. With our paperless option you can view all your annuity documents in one convenient location. Log in at [horacemann.com](http://horacemann.com) or call us at 800-999-1030 to sign up today!

To see performance numbers for all the variable investment options available in your variable annuity contract visit [horacemann.com/-/media/documents/performance/AA1](http://horacemann.com/-/media/documents/performance/AA1). If you do not have Internet access and would like a printed copy of the performance numbers, call 800-999-1030. Information on all fees and expenses for this product can be found at [dfinview.com/HoraceMann/TAHD/SA](http://dfinview.com/HoraceMann/TAHD/SA).

Horace Mann can better protect our clients if we have the ability to contact a person designated by a client as a trusted contact person in the event we suspect that a client may be subject to financial exploitation. If you would like to designate a trusted contact person, please contact your agent or contact us using the Horace Mann contact information in this document.

● **Current investment allocation**



Allocation of value	Total value 03/31/2023	Asset category Investment option	Current premium allocation	
			By option	By category
100.0%	\$117,975.85	Balanced		100%
		Wilsh VIT Global Aloc	100%	
100.0%	\$117,975.85			100%



# Annuity Transactional Confirmation

#BWNKGCV

#ANNU 649A A098 92R6#

MB 01 000209 66006 H 2 B



Susan M. Mc Farland

204 Highland Woods Dr

Safety Harbor, FL 34695-5440

● **Statement date** 04/17/2023

Page 1 of 1

● **Annuitant**

Susan M. Mc Farland

● **Contract information**

Number 0506109430

Plan type IRA

Annuitant/Employee

Issue date 04/15/1988

Next renewal date 04/15/2028

Current renewal period 05 years

● **Contacting Horace Mann**

Home Office Horace Mann Life Insurance Company  
1 Horace Mann Plaza  
Springfield, IL 62715-0001

Your agent John Baron Crager  
Suncoast Ins Llc  
7901 4th St N #314  
St Petersburg, FL 33702

Agent phone 727-497-7701

To report a claim 800-999-1030

Customer Care 800-999-1030

On the Web [www.horacemann.com](http://www.horacemann.com)

## Information from Horace Mann

Your contract's fixed account investment period has renewed. The renewal period and next renewal date have been set and are shown to the right. An early withdrawal penalty may apply on withdrawals or transfers on any date other than the renewal date. The guaranteed interest rate for your fixed account is 4.50%.

The minimum amount which can be transferred between and among the fixed account and variable subaccounts is \$100.00 or the entire value of the fixed account or subaccount, whichever is less. The early withdrawal penalty is currently being waived on transfers within your contract from the fixed account to a variable subaccount. If an amount transferred from the fixed account is surrendered or withdrawn within 365 days, this amount will be subject to an early withdrawal penalty as if withdrawn from the fixed account.

If your contract value is less than \$10,000 on your contract anniversary, an annual maintenance fee will be applied. Please refer to your contract for more information.

## Contract activity by investment

Transaction effective date	Transaction type	Transaction amount	Unit price	Total units
<b>Fixed Account</b>				
	Beginning balance	\$35,834.83	\$0.0000	0.000
04/15/2023	(Amount renewed)	\$35,834.83	\$0.0000	0.000
	Ending balance	\$35,834.83		0.000



# Annuity Transactional Confirmation

#BWNKGCV

#ANNU 6492 A098 93R4#

MB 01 000208 66006 H 2 B



Scott J. Mc Farland

204 Highland Woods Dr

Safety Harbor, FL 34695-5440

● **Statement date** 04/17/2023

Page 1 of 1

● **Annuitant**

Scott J. Mc Farland

● **Contract information**

Number 0506109450

Plan type IRA

Annuitant/Employee

Issue date 04/15/1988

Next renewal date 04/15/2028

Current renewal period 05 years

● **Contacting Horace Mann**

Home Office Horace Mann Life Insurance Company  
1 Horace Mann Plaza  
Springfield, IL 62715-0001

Your agent John Baron Crager  
Suncoast Ins Llc  
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The minimum amount which can be transferred between and among the fixed account and variable subaccounts is \$100.00 or the entire value of the fixed account or subaccount, whichever is less. The early withdrawal penalty is currently being waived on transfers within your contract from the fixed account to a variable subaccount. If an amount transferred from the fixed account is surrendered or withdrawn within 365 days, this amount will be subject to an early withdrawal penalty as if withdrawn from the fixed account.

If your contract value is less than \$10,000 on your contract anniversary, an annual maintenance fee will be applied. Please refer to your contract for more information.

## Contract activity by investment

Transaction effective date	Transaction type	Transaction amount	Unit price	Total units
<b>Fixed Account</b>				
	Beginning balance	\$126,445.08	\$0.0000	0.000
04/15/2023	(Amount renewed)	\$126,445.08	\$0.0000	0.000
	Ending balance	\$126,445.08		0.000



## Amptech, Inc. 401(k) Plan

Division: SEA LINK I  
Amptech Inc  
Scott Colbert  
201 Glocheski Drive  
Manistee, MI 49660



SCOTT MCFARLAND  
204 HIGHLAND WOODS DR.  
SAFETY HARBOR, FL 34695

### Your Retirement Plan Statement

If you have questions regarding  
this statement, call 800-473-6879,  
(ask for participant services)  
View your account at [sentry.com/retirement](https://sentry.com/retirement)

For The Period: 01/01/2023 - 03/31/2023  
**PARTICIPANT INFORMATION**

Employment Date: 03/31/1999  
Contract Number: 875044071

ACTIVITY THIS PERIOD								
SOURCE	VESTED PERCENT	BEGINNING BALANCE	GAIN OR LOSS	CONTRIBUTIONS	FORFEITURES	WITHDRAWALS	TRANSFERS	ENDING BALANCE
Pre-tax 401(k) Source Value	100%	\$977,809.25	\$45,638.29	\$0.00	\$0.00	\$-7,593.66	\$0.00	\$1,015,853.88
Employer match Source Value	100%	\$251,885.59	\$11,846.67	\$0.00	\$0.00	\$0.00	\$0.00	\$263,732.26
Employer match (safe harbor) Source Value	100%	\$41,733.76	\$1,959.85	\$0.00	\$0.00	\$0.00	\$0.00	\$43,693.61
<b>Total</b>		<b>\$1,271,428.60</b>	<b>\$59,444.81</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$-7,593.66</b>	<b>\$0.00</b>	<b>\$1,323,279.75</b>

**Your Total Vested Amount: \$1,323,279.75**

### ESTIMATED LIFETIME INCOME

We provide this monthly income estimate to help you understand the value of your account at your approximate retirement age as a monthly income amount. This estimate is for illustrative purposes only. You don't need to annuitize your account balance. The standard benefit under your plan is a cash distribution or rollover to another account. Based on your total account balance of \$1,323,279.75, your approximate lifetime income estimate at age 67 is \$8,420 per month payable as a life annuity. A qualified joint and 100% survivor annuity may be available. This means \$7,157 per month is payable to you until your death and will continue to your living spouse.\*

\*See lifetime income estimate section below for limitations of this estimate.

Account balance as of 03/31/2023	Monthly payment at age 67 (single life annuity)	Monthly payment at age 67 (qualified joint and 100% survivor annuity)
\$1,323,279.75	\$8,420/month for the life of the participant	\$7,157/month for life of the participant \$7,157/month for remaining lifetime of the participant's surviving spouse

## SUMMARY BY INVESTMENT FUND

INVESTMENT FUND	BEGINNING BALANCE	GAIN OR LOSS	CONTRI- BUTIONS	FORFEI- TURES	WITH- DRAWALS	TRANSFERS	ENDING BALANCE
Equity Growth & Income Account O - T. Rowe Price Equity Income Fund							
Fund Value	\$343,747.70	\$-2,947.24	\$0.00	\$0.00	\$-1,971.17	\$0.00	\$338,829.29
Units	8457.00						8406.87
Large Cap Index Account S - Vanguard 500 Index Fund - Adm Shrs							
Fund Value	\$654,011.77	\$47,455.65	\$0.00	\$0.00	\$-3,962.67	\$0.00	\$697,504.75
Units	17521.55						17417.77
2030 Target Retirement Account III YH - Vanguard Target Retirement 2030 Fund							
Fund Value	\$273,669.13	\$14,936.40	\$0.00	\$0.00	\$-1,659.82	\$0.00	\$286,945.71
Units	23021.11						22884.58
<b>Total</b>	<b>\$1,271,428.60</b>	<b>\$59,444.81</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$-7,593.66</b>	<b>\$0.00</b>	<b>\$1,323,279.75</b>

## YOUR ASSET ALLOCATION

### FIXED INCOME OBJECTIVES

None Currently Selected

0.00%  
**Total 0.00%**

### EQUITY/INCOME BLENDED OBJECTIVES

Large Cap Index Account S - Vanguard 500 Index Fund - Adm Shrs  
Equity Growth & Income Account O - T. Rowe Price Equity Income Fund

52.71%  
25.61%  
**Total 78.32%**

### EQUITY OBJECTIVES

None Currently Selected

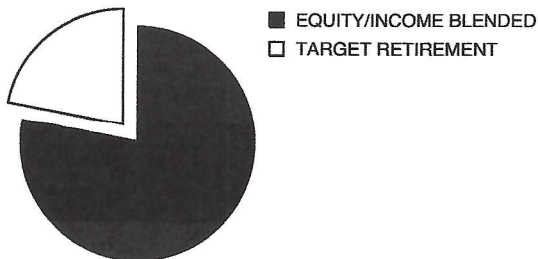
0.00%  
**Total 0.00%**

### TARGET RETIREMENT OBJECTIVES

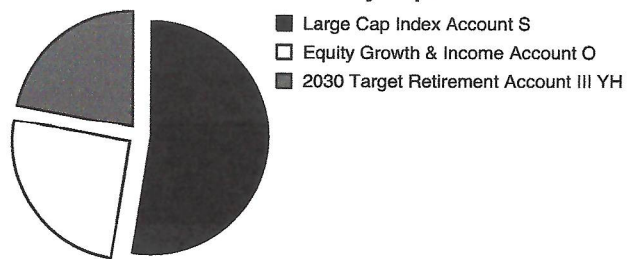
2030 Target Retirement Account III YH - Vanguard Target Retirement 2030 Fund

21.68%  
**Total 21.68%**  
  
100.00%

**Allocation by Investment Objectives**



**Allocation by Separate Accounts**



These pie graphs depict your allocation percentages from above by investment objectives (on the left) and separate accounts (on the right). Both graphs start at noon position and rotate clockwise. For more information on your separate accounts, please refer to your annual Investment Options booklet.

# Account Statement

## January 01, 2023 - March 31, 2023



Account Number: 1F93523

05929 3539324 001 008120 AE N  
 MCFARLAND, SUSAN M  
 204 HIGHLAND WOODS DR  
 SAFETY HARBOR FL 34695-5440

**YOUR CURRENT VALUE**  
**\$439,170.03**

### Important Information

Take action to improve your financial wellness! Check out the Corebridge Financial FutureFIT Wellness Check for a self-assessment of your current saving plan and get instant guidance to help you on your way to financial wellness. Login to your account to try it out today.

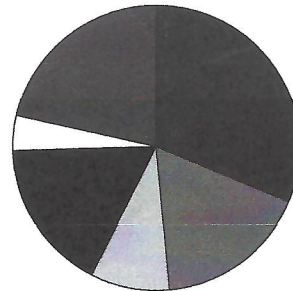
Gain the skills to make financially responsible decisions with our online educational resources. Discover articles and interactive tools and calculators, the FutureFIT Financial Wellness Webinar Series and FutureFIT University to boost your financial education. Visit [corebridgefinancial.com/retirementservices](https://corebridgefinancial.com/retirementservices) to learn more.

### Value Summary

	For the period	Since inception	Surrender value	
Beginning Value	\$427,177.04		As of 03/31/23	\$439,170.03
Internal exchanges/transfers	\$0.00	\$397,797.34	As of 12/31/22	\$427,177.04
Net change in value	\$11,992.99			
<b>Ending Value</b>	<b>\$439,170.03</b>			

### Asset Allocation Summary

Asset class	Ending value	% of total
Large Cap	\$137,558.33	31.33%
Mid Cap	\$75,592.72	17.21%
Small Cap	\$39,284.64	8.94%
Global & Intl Equity	\$75,099.83	17.10%
Specialty	\$17,417.68	3.97%
Fixed Income	\$94,216.83	21.45%
<b>Total</b>	<b>\$439,170.03</b>	<b>100%</b>



Visit your financial representative:  
**TODD GUTMAN**  
 (813) 269-3362

Speak with a Client Service Professional:  
 7AM to 8PM (CST), Monday - Friday  
 (800) 448-2542

Click  
[corebridgefinancial.com/rs](https://corebridgefinancial.com/rs)

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