



# EQUITABLE

For Assistance: Call (800) 628-6673  
Monday – Thursday 8:00 a.m. – 7:00 p.m. EST  
Friday 8:00 a.m. – 5:00 p.m. EST

## EQUI-VEST® VANTAGE<sup>SM</sup> REQUEST FOR SERVICE FORM NJ ACTS and ABP

**Mail completed form to:**  
**Express Mail:**  
Equitable  
EQUI-VEST® Processing Office  
8501 IBM Dr., Suite 150-GR  
Charlotte, NC 28262-4333  
**Regular Mail:**  
Equitable  
EQUI-VEST® Processing Office  
PO Box 1430  
Charlotte, NC 28201-1430  
**Fax Number:**  
(816) 701-4969

### 1. PARTICIPANT INFORMATION *(Certificate number is required to process this request)*

NAME (Last Name, First Name, Middle Initial)

CERTIFICATE NUMBER

ADDRESS

SOCIAL SECURITY NUMBER

CITY/STATE/ZIP

DATE OF BIRTH

DAYTIME PHONE NUMBER

MOBILE PHONE NUMBER

EMAIL ADDRESS

### 2. AUTHORIZATION

I hereby authorize Equitable to make the change(s) I have requested in *Sections 3-6*.

PARTICIPANT'S SIGNATURE

DATE

PLAN ADMINISTRATOR'S SIGNATURE *(if required by employer)*

DATE

### 3. CHANGE NAME FOR: PARTICIPANT

*Note: This section is for change of name by marriage, court decree, or correction. (Attach a copy of the marriage license or court decree.)*

CURRENT NAME

NEW NAME

### 4. CHANGE MAILING ADDRESS

NEW ADDRESS

DAYTIME PHONE NUMBER

CITY

STATE/ZIP

## 5. CHANGE ALLOCATION OF FUTURE CONTRIBUTIONS

Unless the **“One-Time Total Account Reallocation Option”** is selected below, this allocation change applies to future contributions *only*. (Note: You can use TOPS, our automated telephone operated program support service, to process this transaction. Speak to your financial professional for details.)

**One-Time Total Account Reallocation Option** - This allocation change applies to my current account value and future contributions.

The following percentages must be in whole numbers and add up to 100%.

_____ % 1290 VT GAMCO Small Company Value (37*)	_____ % EQ/International Value Managed Volatility (73*)	_____ % EQ/PIMCO Ultra Short Bond (28*)
_____ % 1290 VT SmartBeta Equity ESG (9C*)	_____ % EQ/Invesco Global (6A*)	_____ % EQ/Small Company Index (97*)
_____ % 1290 VT Socially Responsible (92*)	_____ % EQ/Invesco Global Real Assets (9M*)	_____ % EQ/Wellington Energy (90*)
_____ % EQ/400 Managed Volatility (7L*)	_____ % EQ/Janus Enterprise (08*)	_____ % American Funds Insurance Series The Bond Fund of America (8V*)
_____ % EQ/AB Small Cap Growth (TP*)	_____ % EQ/JPMorgan Value Opportunities (72*)	_____ % Delaware Ivy VIP High Income (8G*)
_____ % EQ/Aggressive Allocation (18*)	_____ % EQ/JPMorgan Growth Stock (32*)	_____ % Guaranteed Interest Option (A1*)
_____ % EQ/American Century Mid Cap Value (9J*)	_____ % EQ/Large Cap Growth Index (82*)	_____ % Multimanager Aggressive Equity (T2*)
_____ % EQ/Balanced Strategy (8Q*)	_____ % EQ/Large Cap Value Managed Volatility (89*)	_____ % Multimanager Core Bond (69*)
_____ % EQ/ClearBridge Select Equity Managed Volatility (6F*)	_____ % EQ/Loomis Sayles Growth (34*)	_____ % Segment Holding Account for S&P 500 1 yr -10% Buffer (V1*)
_____ % EQ/Common Stock Index (T1*)	_____ % EQ/MFS International Growth (26*)	_____ % Structured Investment Option S&P 500 1 yr -10% Buffer (V2*)
_____ % EQ/Conservative Allocation (15*)	_____ % EQ/MFS Mid Cap Growth Focused Growth (9P*)	_____ % Target 2015 Allocation (6G*)
_____ % EQ/Core Bond Index (96*)	_____ % EQ/MFS Technology (9S*)	_____ % Target 2025 Allocation (6H*)
_____ % EQ/Core Plus Bond (TH*)	_____ % EQ/MFS Utilities Series (9T*)	_____ % Target 2035 Allocation (6I*)
_____ % EQ/Emerging Markets Equity PLUS (8W*)	_____ % EQ/Mid Cap Index (55*)	_____ % Target 2045 Allocation (6J*)
_____ % EQ/Equity 500 Index (TE*)	_____ % EQ/Moderate Allocation (T4*)	_____ % Target 2055 Allocation (8Z*)
_____ % EQ/Fidelity Institutional AM® Large Cap (9K*)	_____ % EQ/Money Market (T3*)	_____ % VanEck VIP Global Resources (8N*)
_____ % EQ/International Core Managed Volatility (88*)	_____ % EQ/Morgan Stanley Small Cap Growth (9Y*)	
_____ % EQ/International Equity Index (TN*)	_____ % EQ/PIMCO Global Real Return (8Y*)	

**Total (Total of all investment options selected must equal 100%)**

To transfer current monies among Investment Options, complete *Section 6*.

\* The number in parenthesis is shown for data reasons only.

## 6. TRANSFER CURRENT MONIES (See Terms and Conditions below)

Use this form for up to 6 transfer requests. (Please use a Separate Request for Service Form if you have more than six (6) transfers.) Indicate the amount or percentage and investment option you want to transfer *from*, and the amount(s) or percentage(s) and Investment Option(s) you want to transfer *to*. **Total percentage transfers to the Investment Option(s) must equal 100%.**

1290 VT GAMCO Small Company Value (37*)	EQ/International Value Managed Volatility (73*)	EQ/PIMCO Ultra Short Bond (28*)
1290 VT SmartBeta Equity ESG (9C*)	EQ/Invesco Global (6A*)	EQ/Small Company Index (97*)
1290 VT Socially Responsible (92*)	EQ/Invesco Global Real Assets (9M*)	EQ/Wellington Energy (90*)
EQ/400 Managed Volatility (7L*)	EQ/Janus Enterprise (08*)	American Funds Insurance Series The Bond Fund of America (8V*)
EQ/AB Small Cap Growth (TP*)	EQ/JPMorgan Value Opportunities (72*)	Delaware Ivy VIP High Income (8G*)
EQ/Aggressive Allocation (18*)	EQ/JPMorgan Growth Stock (32*)	Guaranteed Interest Option (A1*)
EQ/American Century Mid Cap Value (9J*)	EQ/Large Cap Growth Index (82*)	Multimanager Aggressive Equity (T2*)
EQ/Balanced Strategy (8Q*)	EQ/Large Cap Value Managed Volatility (89*)	Multimanager Core Bond (69*)
EQ/ClearBridge Select Equity Managed Volatility (6F*)	EQ/Loomis Sayles Growth (34*)	Segment Holding Account for S&P 500 1 yr -10% Buffer (V1*)
EQ/Common Stock Index (T1*)	EQ/MFS International Growth (26*)	Structured Investment Option S&P 500 1 yr -10% Buffer (V2*)
EQ/Conservative Allocation (15*)	EQ/MFS Mid Cap Growth Focused Growth (9P*)	Target 2015 Allocation (6G*)
EQ/Core Bond Index (96*)	EQ/MFS Technology (9S*)	Target 2025 Allocation (6H*)
EQ/Core Plus Bond (TH*)	EQ/MFS Utilities Series (9T*)	Target 2035 Allocation (6I*)
EQ/Emerging Markets Equity PLUS (8W*)	EQ/Mid Cap Index (55*)	Target 2045 Allocation (6J*)
EQ/Equity 500 Index (TE*)	EQ/Moderate Allocation (T4*)	Target 2055 Allocation (8Z*)
EQ/Fidelity Institutional AM® Large Cap (9K*)	EQ/Money Market (T3*)	VanEck VIP Global Resources (8N*)
EQ/International Core Managed Volatility (88*)	EQ/Morgan Stanley Small Cap Growth (9Y*)	
EQ/International Equity Index (TN*)	EQ/PIMCO Global Real Return (8Y*)	

\* The number in parentheses is for data input purposes only.

**Request #1:** Please move \$ \_\_\_\_\_, or \_\_\_\_\_% from \_\_\_\_\_, to: \_\_\_\_\_

AMOUNT INVESTMENT OPTION

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

**Request #2:** Please move \$ \_\_\_\_\_, or \_\_\_\_\_% from \_\_\_\_\_, to: \_\_\_\_\_

AMOUNT INVESTMENT OPTION

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

**Request #3:** Please move \$ \_\_\_\_\_, or \_\_\_\_\_% from \_\_\_\_\_, to: \_\_\_\_\_

AMOUNT INVESTMENT OPTION

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

**Request #4:** Please move \$ \_\_\_\_\_, or \_\_\_\_\_% from \_\_\_\_\_, to: \_\_\_\_\_

AMOUNT INVESTMENT OPTION

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

**Request #5:** Please move \$ \_\_\_\_\_, or \_\_\_\_\_% from \_\_\_\_\_, to: \_\_\_\_\_

AMOUNT INVESTMENT OPTION

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

**Request #6:** Please move \$ \_\_\_\_\_, or \_\_\_\_\_% from \_\_\_\_\_, to: \_\_\_\_\_

AMOUNT INVESTMENT OPTION

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

INVESTMENT OPTION(S): \_\_\_\_\_

AMOUNT(S): \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_% \$ \_\_\_\_\_, or \_\_\_\_\_%

Note: A current transfer does not affect future contributions. **Transfers can also be made by TOPS (Telephone Operated Program Support), or Online Account Access except for transfers TO and FROM the Fixed Maturity Options (FMOs). Ask your financial professional for details.**

## Fixed Maturity Options\*

**Request #1:** Please move \$ \_\_\_\_\_, or \_\_\_\_\_ % from \_\_\_\_\_, to:

	AMOUNT	INVESTMENT OPTION
AMOUNT(S): \$ _____, or _____ % \$ _____, or _____ % \$ _____, or _____ %		
FMO – PERIOD _____	_____	_____
	Maturity Year	Maturity Year
AMOUNT(S): \$ _____, or _____ % \$ _____, or _____ % \$ _____, or _____ %		
FMO – PERIOD _____	_____	_____
	Maturity Year	Maturity Year

**Request #2:** Please move \$ \_\_\_\_\_, or \_\_\_\_\_ % from \_\_\_\_\_, to:

	AMOUNT	INVESTMENT OPTION
AMOUNT(S): \$ _____, or _____ % \$ _____, or _____ % \$ _____, or _____ %		
FMO – PERIOD _____	_____	_____
	Maturity Year	Maturity Year
AMOUNT(S): \$ _____, or _____ % \$ _____, or _____ % \$ _____, or _____ %		
FMO – PERIOD _____	_____	_____
	Maturity Year	Maturity Year

\* We will not accept allocations to an FMO if on the date the contribution is to be applied, the rate to maturity is 3%.

## TERMS AND CONDITIONS

1. Address changes and financial transactions will be verified by a confirmation notice. If you do not receive a notice within 14 days of making a request, please notify us immediately.
2. Transactions are effective on the business day this form, properly completed and signed, is received at the EQUI-VEST Processing Office.
3. We reserve the right to limit allocations and transfers into and out of the GIO.
4. You may not transfer into the Segment Holding Account if the upcoming Segment will have a segment maturity date that is later than the certificate maturity date.
5. You may not transfer amounts into the Segment Holding Account and designate a Segment Start Date. The amounts in the Segment Holding Account will be transferred on the first Segment Start Date on which all participation requirements are met (see your prospectus or program summary for details).
6. Any amount transferred into the Segment Holding Account on a Segment Start Date will not be transferred into the Segment that is created on that Segment Start Date. Instead, this amount will be transferred into a Segment on the following month's Segment Start Date, provided all participation requirements are met.
7. All amounts in the Segment Holding Account as of the close of business on the business day prior to the Segment Start Date will automatically be transferred into the Segment on the Segment Start Date subject to participation requirements.
8. You may not transfer out of the Segment Holding Account on a Segment Start Date. If a request is received on the Segment Start Date, the transfer will be processed on the next business day if there are any amounts in the Segment Holding Account on that date.
9. For your protection, California law requires the following to appear on this form. Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

FOR MORE INFORMATION, SEE YOUR EQUI-VEST PROSPECTUS/PROGRAM SUMMARY AND ANY SUPPLEMENTS, OR CONTACT OUR CUSTOMER SERVICE REPRESENTATIVES, TOLL-FREE, AT 1-800-628-6673.