



# 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

www.equitable.com

**Current Online Transactions: Address Changes, Allocation Changes, Dollar Cost Averaging Set Ups, Inquiries, Systematic Asset Rebalancing, Transfers**

## EQUI-VEST®EXPRESS<sup>SM</sup>

Variable Annuity Series

Dollar Cost Averaging Form



This transaction can also be completed online by logging into your account at www.equitable.com

Available to:  Clients  Financial Professionals

### 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) 701-4964

### 1. Annuitant Information

(Contract number must be provided to process this request)

Certificate/Contract Number

Annuitant's Name (Last, First, Middle)

Owner's Name (if different from Annuitant)

Email Address

Daytime Phone Number

Mobile Phone Number

Address Number and Street

Apt/Suite/Floor

City

State

Zip Code

Annuitant's Daytime Phone Number

Annuitant's Mobile Phone Number

Email Address

Please check if this is an Address Change

### 2. General Dollar Cost Averaging Status

Is this a change to an existing Dollar Cost Averaging election?

Yes

No

If the answer is Yes, this election will supersede the existing election.

### 3. Choose Your Investment Fund(s)

The program transfers a given amount automatically from the EQ/Money Market Option to the other Variable Investment Options.

#### Automatic Transfer of Fixed-Dollar Amount.

- Indicate the monthly total amount (\$50 minimum) to be transferred from the EQ/Money Market Option \$\_\_\_\_\_
- Select a transfer duration:
  - 12 months
  - 24 months
  - 36 months
  - until zero balance in the EQ/Money Market Option
- Provide whole dollar amounts in the spaces next to the options you have chosen.
- No more than 10 funds may be selected.

**3. Choose Your Investment Fund(s) (Continued)**

<b>Structured Investment Option Segment</b>			
<input type="checkbox"/> MSCI EAFE 1year -10% Buffer (VD*) <sup>1</sup>	<input type="checkbox"/> To EQ/Equity 500 Index (TE*)	<input type="checkbox"/> To EQ/Global Equity Managed Volatility (78*)	
<input type="checkbox"/> Russell 2000 1year -10% Buffer (V7*) <sup>1</sup>	<input type="checkbox"/> To EQ/Fidelity Institutional AM® Large Cap (9K*) <sup>4</sup>	<input type="checkbox"/> To EQ/International Core Managed Volatility (88*)	
<input type="checkbox"/> Russell 2000 3year -20% Buffer (V9*) <sup>1,2</sup>	<input type="checkbox"/> To EQ/Franklin Rising Dividends (9U*) <sup>3</sup>	<input type="checkbox"/> To EQ/International Equity Index (TN*)	
<input type="checkbox"/> Russell 2000 5year -20% Buffer (VB*) <sup>1,2</sup>	<input type="checkbox"/> To EQ/Invesco Comstock (07*)	<input type="checkbox"/> To EQ/International Managed Volatility (7N*)	
<input type="checkbox"/> S&P 500 1year -10% Buffer (V1*) <sup>1</sup>	<input type="checkbox"/> To EQ/JPMorgan Value Opportunities (72*)	<input type="checkbox"/> To EQ/International Value Managed Volatility (73*)	
<input type="checkbox"/> S&P 500 3year -20% Buffer (V3*) <sup>1,2</sup>	<input type="checkbox"/> To EQ/JPMorgan Growth Stock (32*)	<input type="checkbox"/> To EQ/Invesco Global (6A*)	
<input type="checkbox"/> S&P 500 5year -20% Buffer (V5*) <sup>1,2</sup>	<input type="checkbox"/> To EQ/Large Cap Core Managed Volatility (85*)	<input type="checkbox"/> To EQ/Lazard Emerging Markets Equity (9Q*)	
<b>Asset Allocation</b>		<b>Bonds</b>	
<b>EQ Allocation</b>		<input type="checkbox"/> To 1290 VT DoubleLine Opportunistic Bond (9F*) <sup>5</sup>	
<input type="checkbox"/> To EQ/Aggressive Allocation (18*)	<input type="checkbox"/> To EQ/Large Cap Growth Index (82*)	<input type="checkbox"/> To 1290 VT High Yield Bond (8X*)	
<input type="checkbox"/> To EQ/Balanced Strategy(8Q*)	<input type="checkbox"/> To EQ/Large Cap Growth Managed Volatility (77*)	<input type="checkbox"/> To EQ/Core Bond Index (96*)	
<input type="checkbox"/> To EQ/Conservative Allocation (15*)	<input type="checkbox"/> To EQ/Large Cap Value Index (49*)	<input type="checkbox"/> To EQ/Core Plus Bond (TH*)	
<input type="checkbox"/> To EQ/Conservative Growth Strategy(8R*)	<input type="checkbox"/> To EQ/Large Cap Value Managed Volatility (89*)	<input type="checkbox"/> To EQ/Intermediate Government Bond (TI*)	
<input type="checkbox"/> To EQ/Conservative-Plus Allocation (16*)	<input type="checkbox"/> To EQ/Loomis Sayles Growth (34*)	<input type="checkbox"/> To EQ/PIMCO Global Real Return (8Y*)	
<input type="checkbox"/> To EQ/Conservative Strategy(8S*)	<input type="checkbox"/> To EQ/Value Equity (81*)	<input type="checkbox"/> To EQ/PIMCO Ultra Short Bond (28*)	
<input type="checkbox"/> To EQ/Moderate Allocation (T4*)	<input type="checkbox"/> To MFS® Investors Trust (7P*)	<input type="checkbox"/> To EQ/Quality Bond PLUS (TQ*)	
<input type="checkbox"/> To EQ/Moderate Growth Strategy (8O*)	<input type="checkbox"/> To MFS® Massachusetts Investors Growth Stock (8I*)	<input type="checkbox"/> To American Funds Insurance Series The Bond Fund of America (8V*)	
<input type="checkbox"/> To EQ/Moderate-Plus Allocation (17*)	<input type="checkbox"/> To Multimanager Aggressive Equity (T2*)	<input type="checkbox"/> To Delaware Ivy VIP High Income (8G*)	
<b>Target Allocation</b>		<input type="checkbox"/> To Fidelity VIP Investment Grade Bond (BD*)	
<input type="checkbox"/> To Target 2015 Allocation (6G*)	<input type="checkbox"/> To Principal VC Equity Income (BE*)	<input type="checkbox"/> To Invesco V.I. High Yield (8L*)	
<input type="checkbox"/> To Target 2025 Allocation (6H*)	<b>Small/Mid Cap Stocks</b>		<input type="checkbox"/> To Multimanager Core Bond (69*)
<input type="checkbox"/> To Target 2035 Allocation (6I*)	<input type="checkbox"/> To 1290 VT GAMCO Small Company Value (37*)	<input type="checkbox"/> To EQ/Money Market (T3*)	
<input type="checkbox"/> To Target 2045 Allocation (6J*)	<input type="checkbox"/> To 1290 VT Microcap (9V*) <sup>3</sup>	<b>Sector/Specialty</b>	
<input type="checkbox"/> To Target 2055 Allocation (8Z*)	<input type="checkbox"/> To 1290 VT Small Cap Value (9D*)	<input type="checkbox"/> To 1290 VT Convertible Securities (9X*)	
<b>Other Asset Allocation</b>		<input type="checkbox"/> To 1290 VT GAMCO Mergers & Acquisitions (25*)	
<input type="checkbox"/> To EQ/AB Dynamic Moderate Growth (8P*)	<input type="checkbox"/> To EQ/400 Managed Volatility (7L*)	<input type="checkbox"/> To EQ/Invesco Global Real Assets (9M*)	
<input type="checkbox"/> To EQ/Aggressive Growth Strategy (9Z*)	<input type="checkbox"/> To EQ/2000 Managed Volatility (7K*)	<input type="checkbox"/> To EQ/MFS Technology (9S*)	
<input type="checkbox"/> To EQ/All Asset Growth Allocation (7H*)	<input type="checkbox"/> To EQ/AB Small Cap Growth (TP*)	<input type="checkbox"/> To EQ/MFS Utilities Series (9T*)	
<input type="checkbox"/> To Equitable Conservative Growth MF/ETF (8U*)	<input type="checkbox"/> To EQ/American Century Mid Cap Value (9J*)	<input type="checkbox"/> To EQ/Wellington Energy (9O*)	
<input type="checkbox"/> To Equitable Growth MF/ETF (BA*)	<input type="checkbox"/> To EQ/Franklin Small Cap Value Managed Volatility (6E*)	<input type="checkbox"/> To Multimanager Technology (67*)	
<input type="checkbox"/> To Equitable Moderate Growth MF/ETF (BB*)	<input type="checkbox"/> To EQ/Goldman Sachs Mid Cap Value (9L*)	<input type="checkbox"/> To VanEck VIP Global Resources (8N*)	
<b>Large Cap Stocks</b>		<b>Cash Equivalents</b>	
<input type="checkbox"/> To 1290 VT Equity Income (33*)	<input type="checkbox"/> To EQ/Janus Enterprise (08*)	<input type="checkbox"/> To EQ/Money Market (T3*)	
<input type="checkbox"/> To 1290 VT Socially Responsible (92*)	<input type="checkbox"/> To EQ/MFS Mid Cap Focused Growth (9P*)		
<input type="checkbox"/> To EQ/500 Managed Volatility (7M*)	<input type="checkbox"/> To EQ/Mid Cap Index (55*)		
<input type="checkbox"/> To EQ/AB Sustainable U.S. Thematic (BC*)	<input type="checkbox"/> To EQ/Mid Cap Value Managed Volatility (79*)		
<input type="checkbox"/> To EQ/Capital Group Research (86*)	<input type="checkbox"/> To EQ/Morgan Stanley Small Cap Growth (9Y*)		
<input type="checkbox"/> To EQ/ClearBridge Large Cap Growth ESG (83*)	<input type="checkbox"/> To EQ/Small Company Index (97*)		
<input type="checkbox"/> To EQ/ClearBridge Select Equity Managed Volatility (6F*)	<input type="checkbox"/> To Invesco V.I. Main Street Mid Cap Fund® (7T*)		
<input type="checkbox"/> To EQ/Common Stock Index (T1*)	<input type="checkbox"/> To Invesco V.I. Small Cap Equity (7X*)		
<b>International/Global Stocks</b>			
<input type="checkbox"/> To 1290 VT SmartBeta Equity ESG (9C*)			
<input type="checkbox"/> To EQ/Emerging Markets Equity PLUS (8W*)			
		<input type="checkbox"/> %/\$	<b>Total</b>

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

<sup>1</sup> Available for EQUI-VEST Strategies (Series 900) TSA and EDC only.

<sup>2</sup> Not available in New Hampshire.

<sup>3</sup> Available for EQUI-VEST (Series 800 and 801) only.

<sup>4</sup> Fidelity Institutional AM is a Registered Mark of FMR LLC. Used with permission.

<sup>5</sup> Available for EQUI-VEST (Series 201 and 801) and EQUI-VEST Strategies (Series 900 and 901) only.

#### 4. Authorization

Please activate this feature within my EQUI-VEST Express Contract. I have read and understand the Terms and Conditions appearing on page 3.

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.

Signature of Annuitant \_\_\_\_\_ Date \_\_\_\_\_

Signature of Owner (IF OTHER THAN ANNUITANT.) \_\_\_\_\_ Date \_\_\_\_\_

(IF CORPORATION OR TRUST, THEN SIGNATURE & TITLE OF AUTHORIZED INDIVIDUAL ON BEHALF OF OWNER.)

#### Terms And Conditions for EQUI-VEST Express

1. You can change the way your savings are invested at any time by sending us a Request For Service form or by using the Telephone Operated Program Support (TOPS) System.
2. You can discontinue the DCA feature at any time by sending us a written request or by using our Telephone Operated Program Support (TOPS) line at 800-755-7777.
3. Investing in the variable investment options does not guarantee a profit or protect against loss in a declining market.
4. Financial transactions will be verified by a confirmation notice. If you do not receive a notice within 14 days of the transaction, please notify us immediately.

#### Automatic Transfer of Fixed-Dollar Amount.

5. Equitable will verify that a minimum of \$2,000 is in your EQ/Money Market Option upon receipt of this form by Equitable's EQUI-VEST Processing Office. The first transfer will occur on the last business day of that month, and future transfers will occur on the last business day of each month.
6. This election will automatically stop under these circumstances: the number of transfers indicated on this form have been completed and the balance in the EQ/Money Market Option is zero.

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