



For Assistance: Call (800) 628-6673
Monday – Friday
www.equitable.com

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

EQUI-VEST®EXPRESS™
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

EQUITABLE FINANCIAL LIFE INSURANCE COMPANY (EFLIC)
EQUITABLE FINANCIAL LIFE INSURANCE COMPANY OF AMERICA (EFLOA)

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

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.

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

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

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

² Not available in New Hampshire.

³ Available for EQUI-VEST (Series 800 and 801) only.

⁴ Fidelity Institutional AM is a Registered Mark of FMR LLC. Used with permission.

⁵ 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.*