



# 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  
Suite 1000, 100 Madison St.  
Syracuse, N.Y. 13202

### Regular Mail:

Equitable  
EQUI-VEST Processing Office  
P.O. Box 4956  
Syracuse, N.Y. 13221

### 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.

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

<p><b>Structured Investment Option Segment</b></p> <p>_____ MSCI EAFE 1year -10% Buffer (VD*)<sup>1</sup></p> <p>_____ Russell 2000 1year -10% Buffer (V7*)<sup>1</sup></p> <p>_____ Russell 2000 3year -20% Buffer (V9*)<sup>1,2</sup></p> <p>_____ Russell 2000 5year -20% Buffer (VB*)<sup>1,2</sup></p> <p>_____ S&amp;P 500 1year -10% Buffer (V1*)<sup>1</sup></p> <p>_____ S&amp;P 500 3year -20% Buffer (V3*)<sup>1,2</sup></p> <p>_____ S&amp;P 500 5year -20% Buffer (V5*)<sup>1,2</sup></p>	<p>_____ To EQ/Franklin Rising Dividends (9U*)<sup>3</sup></p> <p>_____ To EQ/Invesco Comstock (07*)</p> <p>_____ To EQ/JPMorgan Value Opportunities (72*)</p> <p>_____ To EQ/Large Cap Core Managed Volatility (85*)</p> <p>_____ To EQ/Large Cap Growth Index (82*)</p> <p>_____ To EQ/Large Cap Growth Managed Volatility (77*)</p> <p>_____ To EQ/Large Cap Value Index (49*)</p> <p>_____ To EQ/Large Cap Value Managed Volatility (89*)</p> <p>_____ To EQ/Loomis Sayles Growth (34*)</p> <p>_____ To EQ/T. Rowe Price Growth Stock (32*)</p> <p>_____ To EQ/Value Equity (81*)</p> <p>_____ To MFS® Investors Trust (7P*)</p> <p>_____ To MFS® Massachusetts Investors Growth Stock (8I*)</p> <p>_____ To Multimanager Aggressive Equity (T2*)</p>	<p>_____ To EQ/Global Equity Managed Volatility (78*)</p> <p>_____ To EQ/International Core Managed Volatility (88*)</p> <p>_____ To EQ/International Equity Index (TN*)</p> <p>_____ To EQ/International Managed Volatility (7N*)</p> <p>_____ To EQ/International Value Managed Volatility (73*)</p> <p>_____ To EQ/Invesco Global (6A*)</p> <p>_____ To EQ/Invesco International Growth (9N*)</p> <p>_____ To EQ/Lazard Emerging Markets Equity (9Q*)</p> <p>_____ To EQ/MFS International Growth (26*)</p> <p>_____ To EQ/MFS International Intrinsic Value (9R*)</p>	
<p><b>Asset Allocation</b></p> <p><b>EQ Allocation</b></p> <p>_____ To EQ/Aggressive Allocation (18*)</p> <p>_____ To EQ/Balanced Strategy(8Q*)</p> <p>_____ To EQ/Conservative Allocation (15*)</p> <p>_____ To EQ/Conservative Growth Strategy(8R*)</p> <p>_____ To EQ/Conservative-Plus Allocation (16*)</p> <p>_____ To EQ/Conservative Strategy(8S*)</p> <p>_____ To EQ/Moderate Allocation (T4*)</p> <p>_____ To EQ/Moderate Growth Strategy (8O*)</p> <p>_____ To EQ/Moderate-Plus Allocation (17*)</p>	<p><b>Small/Mid Cap Stocks</b></p> <p>_____ To 1290 VT GAMCO Small Company Value (37*)</p> <p>_____ To 1290 VT Microcap (9V*)<sup>3</sup></p> <p>_____ To 1290 VT Small Cap Value (9D*)</p> <p>_____ To EQ/400 Managed Volatility (7L*)</p> <p>_____ To EQ/2000 Managed Volatility (7K*)</p> <p>_____ To EQ/AB Small Cap Growth (TP*)</p> <p>_____ To EQ/American Century Mid Cap Value (9J*)</p> <p>_____ To EQ/Franklin Small Cap Value Managed Volatility (6E*)</p> <p>_____ To EQ/Goldman Sachs Mid Cap Value (9L*)</p> <p>_____ To EQ/Janus Enterprise (08*)</p> <p>_____ To EQ/MFS Mid Cap Focused Growth (9P*)</p> <p>_____ To EQ/Mid Cap Index (55*)</p> <p>_____ To EQ/Mid Cap Value Managed Volatility (79*)</p> <p>_____ To EQ/Morgan Stanley Small Cap Growth (9Y*)</p> <p>_____ To EQ/Small Company Index (97*)</p> <p>_____ To Delaware Ivy VIP Small Cap Growth (7Y*)</p> <p>_____ To Invesco V.I. Main Street Mid Cap Fund® (7T*)</p> <p>_____ To Invesco V.I. Small Cap Equity (7X*)</p>	<p><b>Bonds</b></p> <p>_____ To 1290 VT DoubleLine Opportunistic Bond (9F*)<sup>5</sup></p> <p>_____ To 1290 VT High Yield Bond (8X*)</p> <p>_____ To EQ/Core Bond Index (96*)</p> <p>_____ To EQ/Core Plus Bond (TH*)</p> <p>_____ To EQ/Intermediate Government Bond (TI*)</p> <p>_____ To EQ/PIMCO Global Real Return (8Y*)</p> <p>_____ To EQ/PIMCO Ultra Short Bond (28*)</p> <p>_____ To EQ/Quality Bond PLUS (TQ*)</p> <p>_____ To American Funds Insurance Series The Bond Fund of America (8V*)</p> <p>_____ To Delaware Ivy VIP High Income (8G*)</p> <p>_____ To Invesco V.I. High Yield (8L*)</p> <p>_____ To Multimanager Core Bond (69*)</p>	
<p><b>Target Allocation</b></p> <p>_____ To Target 2015 Allocation (6G*)</p> <p>_____ To Target 2025 Allocation (6H*)</p> <p>_____ To Target 2035 Allocation (6I*)</p> <p>_____ To Target 2045 Allocation (6J*)</p> <p>_____ To Target 2055 Allocation (8Z*)</p> <p><b>Other Asset Allocation</b></p> <p>_____ To All 1290 VT DoubleLine Dynamic Allocation (8U*)</p> <p>_____ To EQ/AB Dynamic Moderate Growth (8P*)</p> <p>_____ To EQ/Aggressive Growth Strategy (9Z*)</p> <p>_____ To EQ/All Asset Growth Allocation (7H*)</p>	<p><b>International/Global Stocks</b></p> <p>_____ To 1290 VT Low Volatility Global Equity (9W*)<sup>3</sup></p> <p>_____ To 1290 VT SmartBeta Equity ESG (9C*)</p> <p>_____ To EQ/Emerging Markets Equity PLUS (8W*)</p>	<p><b>Cash Equivalents</b></p> <p>_____ To EQ/Money Market (T3*)</p> <p><b>Sector/Specialty</b></p> <p>_____ To 1290 VT Convertible Securities (9X*)<sup>3</sup></p> <p>_____ To 1290 VT GAMCO Mergers &amp; Acquisitions (25*)</p> <p>_____ To EQ/Invesco Global Real Assets (9M*)</p> <p>_____ To EQ/MFS Technology (9S*)</p> <p>_____ To EQ/MFS Utilities Series (9T*)</p> <p>_____ To EQ/Wellington Energy (9O*)</p> <p>_____ To Multimanager Technology (67*)</p> <p>_____ To VanEck VIP Global Resources (8N*)</p>	
<p><b>Large Cap Stocks</b></p> <p>_____ To 1290 VT Equity Income (33*)</p> <p>_____ To 1290 VT Socially Responsible (92*)</p> <p>_____ To EQ/500 Managed Volatility (7M*)</p> <p>_____ To EQ/Capital Group Research (86*)</p> <p>_____ To EQ/ClearBridge Large Cap Growth ESG (83*)</p> <p>_____ To EQ/ClearBridge Select Equity Managed Volatility (6F*)</p> <p>_____ To EQ/Common Stock Index (T1*)</p> <p>_____ To EQ/Equity 500 Index (TE*)</p> <p>_____ To EQ/Fidelity Institutional AM® Large Cap (9K*)<sup>4</sup></p>	<table border="1"> <tr> <td data-bbox="1068 1696 1190 1747">%/ \$ _____</td> <td data-bbox="1198 1696 1560 1747"><b>Total</b></td> </tr> </table>	%/ \$ _____	<b>Total</b>
%/ \$ _____	<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.

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.*