



EQUITABLE

EQUI-VEST®

*Asset Rebalancing Acceptance
Variable Annuity Series*

For Assistance: Call (800) 628-6673

Monday – Friday

To Sign Up For eDelivery:

Visit us at www.equitable.com

Current Online Transactions:

**Address Changes, Allocation Changes,
Dollar Cost Averaging Set Ups, Inquiries,
Systematic Asset Rebalancing, Transfers**

Regular Mail:

Equitable

EQUI-VEST® Processing Office

P.O. Box 1430

Charlotte, NC 28201-1424

Express Mail:

Equitable

EQUI-VEST® Processing Office

8501 IBM Drive Suite 150-GR

Charlotte, NC 28262

Fax:

(816) 701-4969

EQUITABLE FINANCIAL LIFE INSURANCE COMPANY (EFLIC)

EQUITABLE FINANCIAL LIFE INSURANCE COMPANY OF AMERICA (EFLOA)

PLEASE PRINT

Please note, if you are enrolled in the Future Capital Account Program these automatic transactions are not allowed and will be terminated. IF YOU HAVE ANY QUESTIONS PLEASE CONTACT CUSTOMER SERVICE.

1. Owner's Information (Please Print)

Certificate/Contract Number: _____

Owner's Name: _____
First Middle/MI Last

Owner's Daytime Phone Number: _____ Owner's Mobile Phone Number: _____

Owner's Email Address: _____

Joint Owner's Name: _____
First Middle/MI Last

Joint Owner's Daytime Phone Number: _____ Joint Owner's Mobile Phone Number: _____

Joint Owner's Email Address: _____

Annuitant's Name (if other than owner): _____
First Middle/MI Last

Address: _____
Number and Street Apt/Suite/Floor

City State Zip Code

2. Asset Rebalancing Status

“Important Information if You Are Currently Enrolled in the Semester Strategies Program:”

If you choose to elect Asset Rebalancing, such election will terminate your participation in the Semester Strategies program (“the Program”).

You understand that your current investments and allocation instructions for contributions will not be changed unless you provide new instructions. By terminating the Semester Strategies program, the current segment maturity instructions provided under the Program will remain on file with Equitable and your Segment Maturity Value will continue to be invested in future Segments according to those instructions. If you do not wish to continue investing in the Structured Investment Option, you should consider changing your segment maturity instructions. You can reallocate your investments or provide new allocation instructions by logging into www.equitable.com, contacting my financial professional or by completing this form. Any features that were previously unavailable during my participation in the Program will now be available.

Are you electing to begin Asset Rebalancing? ☐ Yes ☐ No If yes, complete all sections

Is this a change to an existing Asset Rebalancing election? ☐ Yes ☐ No Complete all sections

Would you like to discontinue Asset Rebalancing? ☐ Yes ☐ No To discontinue complete Sections 1, 2 and 6

If the answer is yes to any of the questions above, this election will supersede the existing election.

3. Program Election (Please elect one of the options.)

NOTE: If you are currently enrolled in the Asset Rebalancing program (now titled Option I) and would like to elect to include the Guaranteed Interest Option (GIO) (Option II) check Option II below and indicate in Section 2 that this is a change to an existing Asset Rebalancing election.

☐ Option I — Only the variable investment options will be included in the Asset Rebalancing program.

☐ Option II — The variable investment options and the GIO will be included in the Asset Rebalancing program.

☐ By checking this box, I authorize the termination of my Dollar Cost Averaging program, in order to elect the Asset Rebalancing program with option 2.

4. Frequency of Rebalancing (Select one frequency only.)

All Asset Rebalancing transactions will be processed on the first business day of the month based on your selection. Asset Rebalancing transactions cannot begin in the current month or retroactively.

A. Calendar Quarter—If you choose calendar quarter, please indicate the quarter to begin the first Asset Rebalancing transaction: ☐ January ☐ April ☐ July ☐ October

B. ☐ Semiannual

C. ☐ Annual

If you choose Semiannual or Annual, please indicate *any future month* and the year to begin the first Asset Rebalancing transaction:

Month (mm)

Year (yyyy)

5. Choose your Investment Options and Asset Rebalancing Percentages.

- Please review the series listing prior to completing to verify the availability of each fund
- No more than 20 funds may be selected in the column
- Allocations must be in whole percentages and equal 100%.

| | EQUI-VEST IRA/NQ, SEP, SIMPLE IRA, Corporate Trusteed and KEOGH (Series 100-500) | EQUI-VEST TSA and EDC (Series 100-200), EQUI-VEST Series 600, and EQUI-VEST Vantage (Series 900) | EQUI-VEST (Series 201) | EQUI-VEST (Series 202) | EQUI-VEST (Series 800-801) and EQUI-VEST Express (Series 700-701) | EQUI-VEST Strategies (Series 900) | EQUI-VEST Strategies (Series 901) | Percentage |
|------------------------------------------------------|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|------------------------|------------------------|-------------------------------------------------------------------------|--------------------------------------|--------------------------------------|------------|
| ASSET ALLOCATION | | | | | | | | |
| EQ/AB Dynamic Moderate Growth (8P*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Aggressive Allocation (18*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Aggressive Growth Strategy (9Z*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/All Asset Growth Allocation (7H*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Balanced Strategy (8Q*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Conservative Allocation (15*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Conservative Growth Strategy (8R*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Conservative Strategy (8S*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Conservative-Plus Allocation (16*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Moderate Allocation (T4*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Moderate Growth Strategy (8O*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Moderate-Plus Allocation (17*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| Equitable Conservative Growth MF/ETF Portfolio (8U*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| Equitable Growth MF/ETF Portfolio (BA*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| Equitable Moderate Growth MF/ETF Portfolio (BB*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| BONDS | | | | | | | | |
| 1290 VT DoubleLine Opportunistic Bond (9F*) | N/A | N/A | ✓ | N/A | 801 Only | ✓ | ✓ | % _____ |
| 1290 VT High Yield Bond (8X*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| American Funds Insurance Series Bond (8V*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Core Bond Index (96*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Core Plus Bond (TH*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Intermediate Corporate Bond (BF*) | N/A | N/A | N/A | ✓ | N/A | N/A | N/A | % _____ |
| EQ/Intermediate Government Bond (TI*) | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Long-Term Bond (BK*) | N/A | N/A | N/A | ✓ | N/A | N/A | N/A | % _____ |
| EQ/PIMCO Global Real Return (8Y*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/PIMCO Ultra Short Bond (28*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Quality Bond PLUS (TQ*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| Fidelity® VIP Investment Grade Bond (BD*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| Multimanager Core Bond (69*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| Nomura VIP High Income (8G*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| Templeton Global Bond VIP (8F*) | N/A | N/A | ✓ | N/A | N/A | N/A | ✓ | % _____ |

5. Choose your Investment Options and Asset Rebalancing Percentages. (Continued)

| | EQUI-VEST IRA/NQ, SEP, SIMPLE IRA, Corporate Trusteed and KEOGH (Series 100-500) | EQUI-VEST TSA and EDC (Series 100-200), EQUI-VEST Series 600, and EQUI-VEST Vantage (Series 900) | EQUI-VEST (Series 201) | EQUI-VEST (Series 202) | EQUI-VEST (Series 800-801) and EQUI-VEST Express (Series 700-701) | EQUI-VEST Strategies (Series 900) | EQUI-VEST Strategies (Series 901) | Percentage |
|------------------------------------------------------------|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|------------------------|------------------------|-------------------------------------------------------------------------|--------------------------------------|--------------------------------------|------------|
| CASH EQUIVALENTS | | | | | | | | |
| EQ/Money Market (T3*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| GUARANTEED - FIXED | | | | | | | | |
| Guaranteed Interest Option (A1*) ² | ✓ | ✓ | ✓ | ✓ | 800/801 Only | ✓ | ✓ | %_____ |
| INTERNATIONAL/GLOBAL STOCKS | | | | | | | | |
| 1290 VT SmartBeta Equity ESG (9C*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/Emerging Markets Equity PLUS (8W*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/Global Equity Managed Volatility (78*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/International Core Managed Volatility (88*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/International Equity Index (TN*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/International Managed Volatility (7N*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/International Value Managed Volatility (73*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/Invesco Global (6A*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/Lazard Emerging Markets Equity (9Q*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/MFS International Growth (26*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/MFS International Intrinsic Value (9R*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| LARGE CAP STOCKS | | | | | | | | |
| 1290 VT Equity Income (33*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| 1290 VT Socially Responsible ESG (92*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/500 Managed Volatility (7M*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/Capital Group Research (86*) | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | N/A | %_____ |
| EQ/ClearBridge Large Cap Growth ESG (83*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/ClearBridge Select Equity Managed Volatility (6F*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/Common Stock Index (T1*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/Equity 500 Index (TE*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/Fidelity Institutional AM® Large Cap (9K*) ¹ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/Franklin Rising Dividends (9U*) | N/A | N/A | N/A | N/A | 800/801 Only | N/A | N/A | %_____ |
| EQ/Invesco Comstock (07*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/JPMorgan Growth Stock (32*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/JPMorgan Value Opportunities (72*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/Large Cap Core Managed Volatility (85*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/Large Cap Growth Index (82*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |
| EQ/Large Cap Growth Managed Volatility (77*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | %_____ |
| EQ/Large Cap Value Index (49*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | %_____ |

5. Choose your Investment Options and Asset Rebalancing Percentages. (Continued)

| | EQUI-VEST IRA/NQ, SEP, SIMPLE IRA, Corporate Trusteed and KEOGH (Series 100-500) | EQUI-VEST TSA and EDC (Series 100-200), EQUI-VEST Series 600, and EQUI-VEST Vantage (Series 900) | EQUI-VEST (Series 201) | EQUI-VEST (Series 202) | EQUI-VEST (Series 800-801) and EQUI-VEST Express (Series 700-701) | EQUI-VEST Strategies (Series 900) | EQUI-VEST Strategies (Series 901) | Percentage |
|------------------------------------------------------|----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|------------------------|------------------------|-------------------------------------------------------------------|-----------------------------------|-----------------------------------|------------|
| LARGE CAP STOCKS (Continued) | | | | | | | | |
| EQ/Large Cap Value Managed Volatility (89*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Loomis Sayles Growth (34*) | ✓ | ✓ | N/A | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/Value Equity (81*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| Fidelity® VIP Equity Income (7S*) | N/A | N/A | ✓ | N/A | N/A | N/A | ✓ | % _____ |
| Invesco V.I. Diversified Dividend (8B*) | N/A | N/A | ✓ | N/A | N/A | N/A | ✓ | % _____ |
| MFS® Massachusetts Investors Growth Stock (8I*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| Multimanager Aggressive Equity (T2*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| SECTOR/SPECIALTY | | | | | | | | |
| 1290 VT Convertible Securities (9X*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| 1290 VT GAMCO Mergers & Acquisitions (25*) | ✓ | ✓ | N/A | N/A | ✓ | ✓ | N/A | % _____ |
| 1290 VT Multi-Alternative Strategies (BI*) | N/A | N/A | N/A | N/A | N/A | N/A | N/A | % _____ |
| 1290 VT Natural Resources (BG*) | N/A | N/A | N/A | ✓ | N/A | N/A | N/A | % _____ |
| 1290 VT Real Estate (BH*) | N/A | N/A | N/A | ✓ | N/A | N/A | N/A | % _____ |
| EQ/Invesco Global Real Assets (9M*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/MFS Technology (9S*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/MFS Utilities Series (9T*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/T. Rowe Price Health Sciences (BJ*) | N/A | N/A | N/A | N/A | N/A | N/A | N/A | % _____ |
| EQ/Wellington Energy (9O*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| Multimanager Technology (67*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| PIMCO VIT CommodityRealReturn® Strategy (8E*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| VanEck VIP Global Resources (8N*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| SMALL/MID CAP STOCKS | | | | | | | | |
| 1290 VT GAMCO Small Company Value (37*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| 1290 VT Microcap (9V*) | N/A | N/A | N/A | N/A | 800/801 Only | N/A | N/A | % _____ |
| 1290 VT Small Cap Value (9D*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/400 Managed Volatility (7L*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/2000 Managed Volatility (7K*) | ✓ | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | % _____ |
| EQ/AB Small Cap Growth (TP*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/American Century Mid Cap Value (9J*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Franklin Small Cap Value Managed Volatility (6E*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Goldman Sachs Mid Cap Value (9L*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Janus Enterprise (08*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/MFS Mid Cap Focused Growth (9P*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Mid Cap Index (55*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Mid Cap Value Managed Volatility (79*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Morgan Stanley Small Cap Growth (9Y*) | ✓ | ✓ | N/A | ✓ | ✓ | ✓ | ✓ | % _____ |
| EQ/Small Company Index (97*) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | % _____ |
| Fidelity® VIP Mid Cap (7U*) | N/A | N/A | ✓ | N/A | N/A | N/A | ✓ | % _____ |

5. Choose your Investment Options and Asset Rebalancing Percentages. (Continued)

| | EQUI-VEST IRA/NQ, SEP, SIMPLE IRA, Corporate Trusteed and KEOGH (Series 100-500) | EQUI-VEST TSA and EDC (Series 100-200), EQUI-VEST Series 600, and EQUI-VEST Vantage (Series 900) | EQUI-VEST (Series 201) | EQUI-VEST (Series 202) | EQUI-VEST (Series 800-801) and EQUI-VEST Express (Series 700-701) | EQUI-VEST Strategies (Series 900) | EQUI-VEST Strategies (Series 901) | Percentage |
|--------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|------------------------|------------------------|-------------------------------------------------------------------------|--------------------------------------|--------------------------------------|------------|
| TARGET ALLOCATION | | | | | | | | |
| Target 2015 Allocation (6G*) | √ | √ | √ | N/A | √ | √ | √ | % _____ |
| Target 2025 Allocation (6H*) | √ | √ | √ | N/A | √ | √ | √ | % _____ |
| Target 2035 Allocation (6I*) | √ | √ | √ | N/A | √ | √ | √ | % _____ |
| Target 2045 Allocation (6J*) | √ | √ | √ | N/A | √ | √ | √ | % _____ |
| Target 2055 Allocation (8Z*) | √ | √ | √ | N/A | √ | √ | √ | % _____ |
| Total (Total of all Investment Options in percentages - must equal 100%) | | | | | | | | % _____ |

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

¹ Fidelity Institutional AM is a Registered Mark of FMR LLC. Used with permission.

² For IRA/NQ contracts issued after May 5, 2008 in certain states: If the account value is \$100,000 or less, no more than 25% of any transfer can be allocated to the Guaranteed Interest Option (GIO). If the account value is greater than \$100,000, no more than 50% of any transfer can be allocated to the GIO.

6. Client Authorization

This section **must** be completed unless the client has completed a Limited Transfers Authorization form for an authorized Financial Professional, and that authorized Financial Professional is making this request based on client instructions.

ALL TRANSACTIONS WILL BE PROCESSED EFFECTIVE ON THE BUSINESS DAY THIS FORM IS RECEIVED (IF ALL REQUIRED INFORMATION IS PROVIDED) IN OUR PROCESSING OFFICE. PLEASE CONSULT YOUR PROSPECTUS FOR RESTRICTIONS, MINIMUM OR MAXIMUM LIMITATIONS, FEES AND OTHER APPLICABLE INFORMATION RELATING TO YOUR REQUEST.

If you have requested a one-time transfer of funds and are currently enrolled in an Asset Rebalancing program, we will process the transfer as requested; however, the Rebalancing program will remain in effect unless you request that it be cancelled. Please check the box below if you wish to have your Asset Rebalancing program cancelled.

☐ **By checking this box and my signature below, I authorize the termination of my Asset Rebalancing program.**

The portion of the Annuity Account Value in the Structured Investment Option (Part II A) may increase or decrease in value based on the performance of external Indices subject to the applicable Performance Cap Rate and Segment Buffer. While the values of this Contract may be affected by an external index, the Contract does not directly participate in any stock or equity investments.

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: _____

Annuitant/Owner's Signature

Current Date (mm/dd/yyyy) _____

General Information about Signature Requirements

Multiple/Joint Owners: Must be signed by all Owners.

Corporation: One officer other than the Insured on behalf of the corporation.

Attorney-in-Fact/Guardian: Must be signed by either the Attorney-in-Fact or Guardian with their title listed. A copy of the appointment is needed if it is not already on file.

Partnerships: Requests must be submitted in the name of the Partnership and signed by a partner other than the Insured, or two partners if Insured signs.

7. Financial Professional Certification

* Should **only** be completed if the client-authorized Financial Professional is making this request based on client instructions and the client has previously signed a Limited Transfer Authorization form (cat.# 146335).

I hereby certify that this request is being made based on the client's instructions to me.

Signature: _____

Financial Professional's Signature

Branch

Agent Number

Current Date (mm/dd/yyyy) _____

* A copy of this completed, signed form must be placed in the client file.

8. Special Instructions