

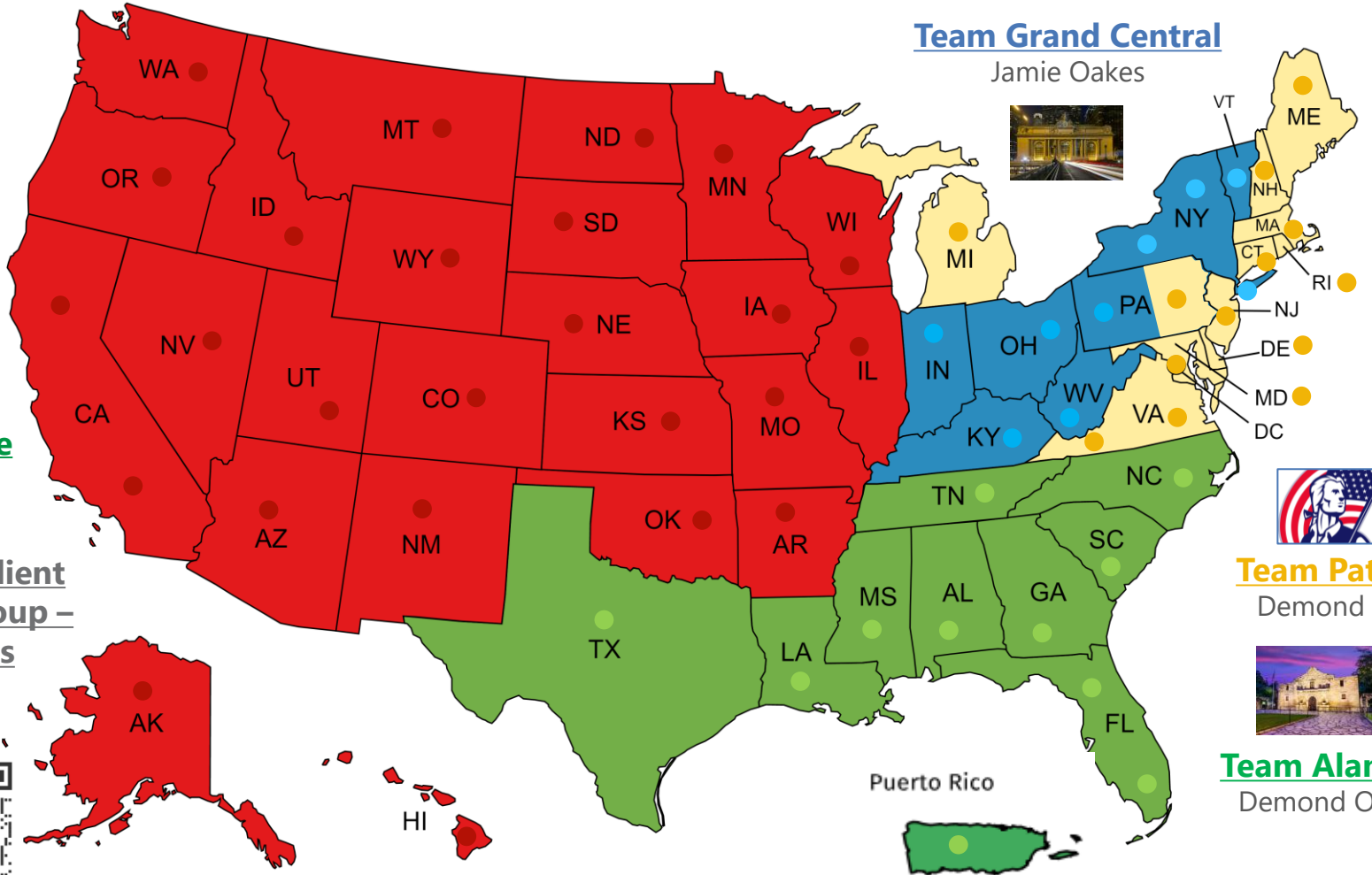
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Team Hollywood
Jamie Oakes

Nationwide



Team Grand Central
Jamie Oakes



Team Patriot
Demond Orr



Team Alamo
Demond Orr

Preferred Client Partners Group – All States



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MNB – The Greater New York Complex (Supporting New York)

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Life New Business Case Management – Team Grand Central

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG)	Joanne Hering (B, J, K, L, M) Karen Lachapelle (F-G, Q-Z) Armoni Stroud (A, C, D, E, H, I, N, O, P)	704-540-3897 704-341-6454 704-341-6426	Joanne.Hering@equitable.com Karen.Lachapelle@equitable.com Armoni.Stroud@equitable.com
Relationship Case Manager (Retail)	Michele Peacock (A-E, I-J, N-O, Q, Y-Z) Armoni Stroud (F, H, T-V) Joanne Hering (L, M, R) Beverly Singleton (G, K, P, S, W, X)	704-341-6711 704-341-6426 704-540-3897 980-308-8901	Michele.Peacock@equitable.com Armoni.Stroud@equitable.com Joanne.Hering@equitable.com Beverly.Singleton@equitable.com
Relationship Case Manager (Concierge)	Jen Jaquin (E-J, M-N, U, Z) Patricea Taylor (B-D, O-R, V-X) Jacquelyn Brown (A, K, S, T, W, Y)	980-308-8916 980-308-8737 704-341-6731	Jennifer.Jaquin@equitable.com Patricea.Taylor@equitable.com Jacquelyn.Brown@equitable.com
Term Conversion RCM	Misty Klock	704-540-3981	Misty.Klock@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

Important Submission Information

Toll Free Phone Number	800-888-9763	Case Status, Administrative Questions
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SWM – Northern Complex (Supporting New York & Vermont)

Life New Business Case Management – Team Grand Central

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Darlyn Tanqui-on	980-308-8734	Darlyn.Tanquion@equitable.com
Relationship Case Manager (EAG)	Armoni Stroud	704-341-6426	Armoni.Stroud@equitable.com
Relationship Case Manager (Retail)	Karen Lachapelle (B, C, K, L, S, V, X-Z) Radica Samaroo (A, D-J, M-R, T, U, W)	704-341-6454 980-308-8915	Karen.Lachapelle@equitable.com Radica.Samaroo@equitable.com
Relationship Case Manager (Concierge)	Patricea Taylor	704-341-6745	Patricea.Taylor@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

Important Submission Information

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CVN – Northern Complex (Supporting Kentucky, Indiana & Ohio)

Life New Business Case Management – Team Grand Central

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Mikee Hernandez	980-308-8266	Mikee.Hernandez@equitable.com
Relationship Case Manager (EAG)	Armoni Stroud (A-Z)	704-341-6426	Armoni.Stroud@equitable.com
Relationship Case Manager (Retail)	Michele Peacock (A-E, S-Z) Beverly Singleton (F-R)	704-341-6711 980-308-8901	Michele.Peacock@equitable.com Beverly.Singleton@equitable.com
Relationship Case Manager (Concierge)	Katie Gordon	704-341-7004	Katie.Gordon@equitable.com
Term Conversion RCM	Nicole Cunningham	704-341-6290	Nicole.Cunningham@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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PSR – Northern Complex (Supporting Pennsylvania & West Virginia)

Life New Business Case Management – Team Grand Central

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Mikee Hernandez	980-308-8266	Mikee.Hernandez@equitable.com
Relationship Case Manager (EAG)	Armoni Stroud	704-341-6426	Armoni.Stroud@equitable.com
Relationship Case Manager (Retail)	Radica Samaroo	980-308-8915	Radica.Samaroo@equitable.com
Relationship Case Manager (Concierge)	Katie Gordon	704-341-7004	Katie.Gordon@equitable.com
Term Conversion RCM	Nicole Cunningham	704-341-6290	Nicole.Cunningham@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com

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ARB - Great Lakes Branch (Supporting Michigan)

Life New Business Case Management – Team Patriot

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Audrin De Asis	980-308-8929	Audrin.Deasis@equitable.com
Relationship Case Manager (EAG & Retail)	Charissa Griffin	704-341-6597	Charissa.Griffin@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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BLT - The Capital Branch (Supporting Virginia & Washington DC)

Life New Business Case Management – Team Patriot

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Audrin De Asis	980-308-8929	Audrin.Deasis@equitable.com
Relationship Case Manager (Retail)	Demetrice Dean	704-341-7092	Demetrice.Dean@equitable.com
Relationship Case Manager (EAG)	Charissa Griffin	704-341-6597	Charissa.Griffin@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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MVA – Maryland/Southwest Virginia

Life New Business Case Management – Team Patriot

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Noreen Andaya	980-308-8268	Noreen.Andaya@equitable.com
Relationship Case Manager (EAG/Retail)	Demetrice Dean	704-341-7092	Demetrice.Dean@equitable.com
Relationship Case Manager (Concierge)	Katie Gordon	704-341-7004	Katie.Gordon@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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PPA - Philadelphia Branch (Supporting Pennsylvania & Delaware)

Life New Business Case Management – Team Patriot

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Noreen Andaya	980-308-8268	Noreen.Andaya@equitable.com
Relationship Case Manager (EAG)	Connie Riggins (A-K) Carol Strini (L-Z)	704-540-3966 704-341-6717	Connie.Riggins@equitable.com Carol.Strini@equitable.com
Relationship Case Manager (Retail)	Deb Lowry	704-341-7002	Deborah.Lowry@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Nicole Cunningham	704-341-6290	Nicole.Cunningham@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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TAR – Atlantic/Liberty Branch

(Supporting New Jersey & Rhode Island)

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Life New Business Case Management – Team Patriot

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Noreen Andaya	980-308-8268	Noreen.Andaya@equitable.com
Relationship Case Manager (EAG)	Charissa Griffin (A-N) Connie Riggins (O-Z)	704-341-6597 704-540-3966	Charissa.Griffin@equitable.com Connie.Riggins@equitable.com
Relationship Case Manager (Retail)	Deb Lowry (A-M) Carol Strini (N-Z)	704-341-7002 704-341-6717	Deborah.Lowry@equitable.com Carol.Strini@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Manager – EAG & Retail RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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CNT – Connecticut

Life New Business Case Management – Team Patriot

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Audrin De Asis	980-308-8929	Audrin.Deasis@equitable.com
Relationship Case Manager (EAG)	Charissa Griffin (A-N) Connie Riggins (O-Z)	704-341-6597 704-540-3966	Charissa.Griffin@equitable.com Connie.Riggins@equitable.com
Relationship Case Manager (Retail)	Deb Lowry (A-M) Carol Strini (N-Z)	704-341-7002 704-341-6717	Deborah.Lowry@equitable.com Carol.Strini@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Manager – EAG & Retail RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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WLS – New England (Supporting Massachusetts, New Hampshire & Maine)

Life New Business Case Management – Team Patriot

Name	Title	Phone	email
Relationship Case Manager (Low Face Term)	Noreen Andaya	980-308-8268	Noreen.Andaya@equitable.com
Relationship Case Manager (EAG/Retail)	Demetrice Dean	704-341-7092	Demetrice.Dean@equitable.com
Relationship Case manager (Concierge)	Katie Gordon	704-341-7004	Katie.Gordon@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Manager – EAG & Retail RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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ASO – Preferred Client Partners Group

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager	Elizabeth Willett	704-341-6656	Elizabeth.Willett@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Term Conversion RCM	Michelle Massey Maureen Miron	704-341-6347 704-341-6782	Michelle.Massey@equitable.com Maureen.Miron@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com

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CHO - Illinois Branch (Supporting Illinois)

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG/Retail)	Jenny Price	315-477-2351	Jenny.Price@equitable.com
Relationship Case Manager (Concierge)	Jen Jaquin	980-308-8916	Jennifer.Jaquin@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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DEN - Rocky Mountain Branch (Supporting Colorado, Utah, Idaho, Montana & Wyoming)

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG/Retail)	Tonya Powell	704-341-6663	Tonya.Powell@equitable.com
Relationship Case Manager (Concierge)	Jen Jaquin	980-308-8916	Jennifer.Jaquin@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
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KSM - Kansas City Branch (Supporting Kansas)

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG/Retail)	Talesha Medlin	704-341-6580	Talesha.Medlin@equitable.com
Relationship Case Manager (Concierge)	Jen Jaquin	980-308-8916	Jennifer.Jaquin@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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LAM - Southern California Branch (Supporting California)

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Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG)	Joe Ruggiero	980-308-8912	Joseph.Ruggiero@equitable.com
Relationship Case Manager (Retail)	Talesha Medlin (A-L) Tonya Powell (M-Z)	704-341-6580 704-341-6663	Talesha.Medlin@equitable.com Tonya.Powell@equitable.com
Relationship Case Manager (Concierge)	Katie Gordon	704-341-7004	Katie.Gordon@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

Important Submission Information

Toll Free Phone Number	800-888-9763	Case Status, Administrative Questions
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Document Management Center email Address	DMC_Underwriting_Regts@equitable.com	Apps, Requirements, Delivery Requirements
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MIW - Wisconsin Branch (Supporting Wisconsin)

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG)	Joe Ruggiero	980-308-8912	Joseph.Ruggiero@equitable.com
Relationship Case Manager (Retail)	Talesha Medlin	704-341-6580	Talesha.Medlin@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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OKC - Oklahoma City Branch (Supporting Oklahoma & Arkansas)

[Important phone numbers](#)

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG/Retail)	Tonya Powell	704-341-6663	Tonya.Powell@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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OMH - Great Plains Branch (Supporting Nebraska, South Dakota & Iowa)

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG/Retail)	Tonya Powell	704-341-6663	Tonya.Powell@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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PXB - Southwest Branch (Supporting Arizona, Nevada & New Mexico)

[Important phone numbers](#)

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG)	Elizabeth Willett (A-M) Jenny Price (N-Z)	704-341-6656 315-477-2351	Elizabeth.Willett@equitable.com Jenny.Price@equitable.com
Relationship Case Manager (Retail)	Elizabeth Willett	704-341-6656	Elizabeth.Willett@equitable.com
Relationship Case Manager (Concierge)	Jen Jaquin	980-308-8916	Jennifer.Jaquin@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Term Conversion RCM	Misty Klock	704-540-3981	Misty.Klock@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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SEC - Pacific Northwest Branch (Supporting Washington, Oregon, Alaska)

[Important phone numbers](#)

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG)	Joe Ruggiero	980-308-8912	Joseph.Ruggiero@equitable.com
Relationship Case Manager (Retail)	Elizabeth Willett (A-R) Joe Ruggiero (S-Z)	704-341-6656 980-308-8912	Elizabeth.Willett@equitable.com Joseph.Ruggiero@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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SFA - California Branch (Supporting Hawaii & Northern California)

[Important phone numbers](#)

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG)	Joe Ruggiero	980-308-8912	Joseph.Ruggiero@equitable.com
Relationship Case Manager (Retail)	Jenny Price (A-F) Joe Ruggiero (G-J) Elizabeth Willett (K-Z)	315-477-2351 980-308-8912 704-341-6656	Jenny.Price@equitable.com Joseph.Ruggiero@equitable.com Elizabeth.Willett@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com

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SLS - St. Louis Branch (Supporting Missouri)

Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG/Retail)	Elizabeth Willett	704-341-6656	Elizabeth.Willett@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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SPL - Minnesota Branch (Supporting Minnesota and North Dakota)

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Life New Business Case Management – Team Hollywood

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Erika Acena	980-308-8898	Erika.Acena@equitable.com
Relationship Case Manager (EAG/Retail)	Talesha Medlin	704-341-6580	Talesha.Medlin@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Toni Smith	980-308-8712	Toni.Smith@equitable.com
Senior Manager – EAG & Retail RCMs	Jamie Oakes	704-341-6367	Jamie.Oakes@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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BRM - Alabama Gulf Coast Branch (Supporting Alabama)

Life New Business Case Management – Team Alamo

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Audrin De Asis	980-308-8929	Audrin.Deasis@equitable.com
Relationship Case Manager (Retail/EAG)	Loretta Bridenhagen	704-341-6046	Loretta.Bridenhagen@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Misty Klock	704-540-3981	Misty.Klock@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

Important Submission Information

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CTN - The Carolinas Branch

(Supporting North Carolina & South Carolina)

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Life New Business Case Management – Team Alamo

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Audrin De Asis	980-308-8929	Audrin.Deasis@equitable.com
Relationship Case Manager (EAG)	Allison McDonald	980-308-8361	Allison.McDonald@equitable.com
Relationship Case Manager (Retail)	Loretta Bridenhagen	704-341-6046	Loretta.Bridenhagen@equitable.com
Relationship Case Manager (Concierge)	Katie Gordon	704-341-7004	Katie.Gordon@equitable.com
Term Conversion RCM	Nicole Cunningham	704-341-6290	Nicole.Cunningham@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

Important Submission Information

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JXL - Jacksonville Branch (Supporting Florida)

Life New Business Case Management – Team Alamo

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Mikee Hernandez	980-308-8266	Mikee.Hernandez@equitable.com
Relationship Case Manager (EAG/Retail)	Yeison Osorio	980-495-7922	Yeison.Osorio@equitable.com
Relationship Case Manager (Concierge)	Katie Gordon	704-341-7004	Katie.Gordon@equitable.com
Term Conversion RCM	Nicole Cunningham	704-341-6290	Nicole.Cunningham@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com

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LAD - Georgia Branch (Supporting Georgia)

Life New Business Case Management – Team Alamo

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Mikee Hernandez	980-308-8266	Mikee.Hernandez@equitable.com
Relationship Case Manager (Retail/EAG)	Loretta Bridenhagen	704-341-6046	Loretta.Bridenhagen@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Misty Klock	704-540-3981	Misty.Klock@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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MIM - South Florida Branch (Supporting Florida)

Life New Business Case Management – Team Alamo

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Audrin De Asis	980-308-8929	Audrin.Deasis@equitable.com
Relationship Case Manager (EAG)	Loretta Bridenhagen	704-341-6046	Loretta.Bridenhagen@equitable.com
Relationship Case Manager (Retail)	Ronda Klucsarits	704-341-6942	Ronda.Klucsarits@equitable.com
Relationship Case Manager (Concierge)	Katie Gordon	704-341-7004	Katie.Gordon@equitable.com
Term Conversion RCM	Nicole Cunningham	704-341-6290	Nicole.Cunningham@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

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NSH - Tennessee Branch (Supporting Tennessee)

[Important phone numbers](#)

Life New Business Case Management – Team Alamo

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Audrin De Asis	980-308-8929	Audrin.Deasis@equitable.com
Relationship Case Manager (EAG/Retail)	Yeison Osorio	980-495-7922	Yeison.Osorio@equitable.com
Relationship Case Manager (Concierge)	Julia Maroulis	704-341-6752	Julia.Maroulis@equitable.com
Term Conversion RCM	Nicole Cunningham	704-341-6290	Nicole.Cunningham@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
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NTM - Texas Branch (Supporting all Texas locations)

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Life New Business Case Management – Team Alamo

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Mikee Hernandez	980-308-8266	Mikee.Hernandez@equitable.com
Relationship Case Manager (EAG)	Allison McDonald	980-308-8361	Allison.McDonald@equitable.com
Relationship Case Manager (Retail)	Allison McDonald (A-D) Ronda Klucsarits (E-Z)	980-308-8361 704-341-6942	Allison.McDonald@equitable.com Ronda.Klucsarits@equitable.com
Relationship Case Manager (Concierge)	Katie Gordon	704-341-7004	Katie.Gordon@equitable.com
Term Conversion RCM	Misty Klock	704-540-3981	Misty.Klock@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
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NWL - South Central Branch (Supporting Louisiana & Mississippi)

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Life New Business Case Management – Team Alamo

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Audrin De Asis	980-308-8929	Audrin.Deasis@equitable.com
Relationship Case Manager (EAG/Retail)	Yeison Osorio	980-495-7922	Yeison.Osorio@equitable.com
Relationship Case Manager (Concierge)	Patricea Taylor	704-341-6745	Patricea.Taylor@equitable.com
Term Conversion RCM	Misty Klock	704-540-3981	Misty.Klock@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
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SJN - Puerto Rico Branch (Supporting Puerto Rico)

Life New Business Case Management – Team Alamo

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Audrin De Asis	980-308-8929	Audrin.Deasis@equitable.com
Relationship Case Manager (EAG/Retail)	Yeison Osorio	980-495-7922	Yeison.Osorio@equitable.com
Relationship Case Manager (Concierge)	Katie Gordon	704-341-7004	Katie.Gordon@equitable.com
Term Conversion RCM	Nicole Cunningham	704-341-6290	Nicole.Cunningham@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
Director	L. Michelle Kepler	219-384-1086	Michelle.Kepler@equitable.com
Head of New Business	Brian Sumutka	704-341-6417	Brian.Sumutka@equitable.com

Important Submission Information

Toll Free Phone Number	800-888-9763	Case Status, Administrative Questions
FASTEST way to submit documents	Upload to Agent Dashboard/Website	
Document Management Center Fax Number	855-266-6819	Apps, Requirements, Delivery Requirements
Document Management Center email Address	DMC_Underwriting_Reqts@equitable.com	Apps, Requirements, Delivery Requirements
Mailing Address	Regular: P.O. Box 1047, Charlotte, NC 28201	Overnight: 8501 IBM Drive, Suite 150, Charlotte, NC 28262

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[Click here to see your Underwriting Contacts](#)

TPA - Central Florida Branch (Supporting Florida)

[Important phone numbers](#)

Life New Business Case Management – Team Alamo

Role	Name	Phone	email
Relationship Case Manager (Low Face Term)	Audrin De Asis	980-308-8929	Audrin.Deasis@equitable.com
Relationship Case Manager (EAG/Retail)	Yeison Osorio	980-495-7922	Yeison.Osorio@equitable.com
Relationship Case Manager (Concierge)	Jacquelyn Brown Patricea Taylor	704-341-6731 980-308-8737	Jacquelyn.Brown@equitable.com Patricea.Taylor@equitable.com
Term Conversion RCM	Misty Klock	704-540-3981	Misty.Klock@equitable.com
Manager - Retail & EAG RCMs	Demond Orr	704-341-6309	Demond.Orr@equitable.com
Senior Manager – Concierge & Term Conversion RCMs	Roger Myers	704-341-6727	Roger.Myers@equitable.com
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Underwriting

Contacts by team

Life Underwriting

Role	Name	Phone	Email
Branches: BRM , CTN , JXL , LAD , MIM , NSH , NTM , NWL , SJM , TPA	Carla Carino	(860) 409-1341	Carla.Carino@equitable.com
	Gabe Delgado	(704) 341-6510	Gabriel.Delgado@equitable.com
	Michael Queen	(704) 341-6612	Michael.Queen@equitable.com
	Randy Urda	(980) 308-8852	Randy.Urda@equitable.com
	Don Yasso	(704) 341-6578	Don.Yasso@equitable.com
Underwriters			
Managing Chief Underwriter	Brenda Armington	(860) 409-1482	Brenda.Armington@equitable.com
Director & Chief Underwriter	Nora Bolick	(704) 341-6944	Nora.Bolick@equitable.com

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Life Underwriting			
Role	Name	Phone	Email
Team 1: BLT , MLO , PPA , MNB , TAR , MVA , CNT Underwriters	Amy Almeida	(980) 308-8777	Amy.Almeida@equitable.com
	Carol Cyr	(860) 409-1417	Carol.Cyr@equitable.com
	Kelly Czarnecki	(704) 341-6336	Kelly.Czarnecki@equitable.com
	Tiffany McIntyre	(704) 341-6536	Tiffany.McIntyre@equitable.com
	Carrie Travieso	(315) 477-2186	Carrie.Travieso@equitable.com
	Marie Washington	(704) 341-6880	Marie.Washington@equitable.com
	Managing Chief Underwriter	Cheryl Hendrix	(704) 341-7113
Director & Chief Underwriter	Nora Bolick	(704) 341-6944	Nora.Bolick@equitable.com

Life Underwriting

Role	Name	Phone	Email
Team 1: ASO , CHO , DEN , KSM , LAM , MIW , OKC , OMH , PXB , SEC , SFA , SLS , SPL Underwriters	Adam Edelen	(704) 341-6490	Adam.Edelen@equitable.com
	Makena Horkan	(704) 341-6508	Makena.Horkan@equitable.com
	Tonya Shine	(704) 341-6695	Tonya.Shine@equitable.com
	Jeanette Winters	(704) 341-6406	Jeanette.Winters@equitable.com
Managing Chief Underwriter	Marsha Johnson	(704) 341-6817	Marsha.Johnson2@equitable.com
Director & Chief Underwriter	Mike Derrig	(860) 409-1270	Michael.Derrig@equitable.com

Life Underwriting

Role	Name	Phone	Email
Team 1: ARB , CVN , PSR , SWM , WLS	Jeremy Buckley	(860) 409-1322	Jeremy.Buckley@equitable.com
	Joy Francis	(860) 409-1141	Joy.Francis@equitable.com
Underwriters	Matthew Kinney	(704) 341-6504	Matthew.Kinney@equitable.com
	John Wray	(980) 495-7920	John.Wray@equitable.com
Managing Chief Underwriter	George Estelle	(980) 308-8804	George.Estelle@equitable.com
Director & Chief Underwriter	Mike Derrig	(860) 409-1270	Michael.Derrig@equitable.com

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Concierge

Life Underwriting – Concierge			
Role	Name	Phone	Email
Underwriters	Lisa Baxter	(704) 341-6006	Lisa.Baxter@equitable.com
	Jordan Herrera	(980) 495-7944	Jordan.Herrera@equitable.com
	Judith Gregory	(704) 341-6002	Judith.Gregory@equitable.com
	Suzanne Marshall	(704) 341-6567	Suzanne.Marshall@equitable.com
	Tammy Nixon	(980) 308-8845	Tammy.Nixon@equitable.com
Managing Chief Underwriter	Ben Brame	(704) 341-6455	Benjamin.Brame@equitable.com
Director & Chief Underwriter	Nora Bolick	(704) 341-6944	Nora.Bolick@equitable.com

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Special Risk Team

Life Underwriting – Special Risk Team			
Role	Name	Phone	Email
Underwriters	Karey Johnson	(980) 308-8846	Karey.Johnson@equitable.com
	Angela Nell	(704) 341-6959	Angela.Nell@equitable.com
	Grace Byrd	(704) 341-6986	Grace.Byrd@equitable.com
	Robin Lopez	(704) 341-6984	Robin.Lopez@equitable.com
	Cylia Williams	(704) 341-6511	Cylia.Williams@equitable.com
Director & Chief Underwriter	Karen Sweeney	(860) 409-1124	Karen.Sweeney@equitable.com

Independent

Life Underwriting – Independent			
Role	Name	Phone	Email
Underwriters	Robert Hamilton	(980) 495-7935	Robert.Hamilton@equitable.com
	Patty Kruse	(980) 308-8776	Patty.Kruse@equitable.com
	Phil Magaldi	(980) 308-8880	Philip.Magaldi@equitable.com
Managing Chief Underwriter	George Estelle	(980) 308-8804	George.Estelle@equitable.com
Director & Chief Underwriter	Mike Derrig	(860) 409-1270	Michael.Derrig@equitable.com

Important phone numbers

For immediate assistance, please call (800) 888-9763

Options	Department			
Option 1	<p>Term Conversion/NB Departments TC team press 1</p> <p>Low-Face Term Team(\$1 Million Face amount and below) press 2</p> <p>New Business Departments press 3, then press 1 for Case Management or press 2 - Commission or press 3 - Life Sales Desk or press 4 - Policy Service or press 5 - Reg 60 or press 6 - Replacements</p>			
		Escalations	Phone	Email
Option 2	Paid Change			life-service@equitable.com
Option 3	Death Claims			life-service@equitable.com
Option 4	Commissions	Betty Vinson	704-341-6479	Betty.Vinson@equitable.com
Option 5	Inforce			Life_PremierSevices@equitable.com
Option 6	Reg 60	Ana Anoai Darlene Sharpling Misty Hendrick	704-341-6919 704-341-6388 704-341-6355	Luaipou.Anoai@equitable.com Darlene.Sharpling@equitable.com Misty.Hendrick@equitable.com
Option 7	1035/Replacements	Ana Anoai Darlene Sharpling Misty Hendrick	704-341-6919 704-341-6388 704-341-6355	Luaipou.Anoai@equitable.com Darlene.Sharpling@equitable.com Misty.Hendrick@equitable.com

E-app Line: 1-855-606-6452, option 3

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