



EQUITABLE

Annuity Portal

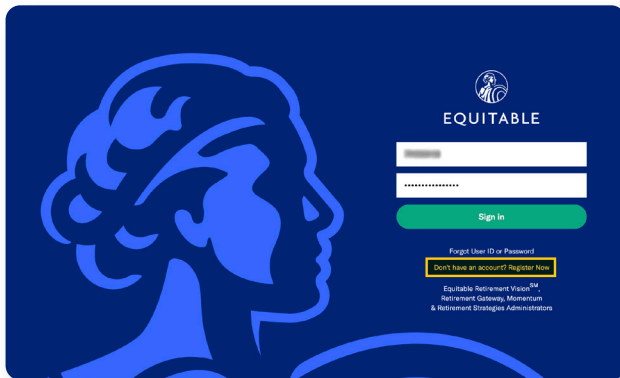
Resource guide

Equitable makes it easy to stay current and manage your Annuity Book of Business

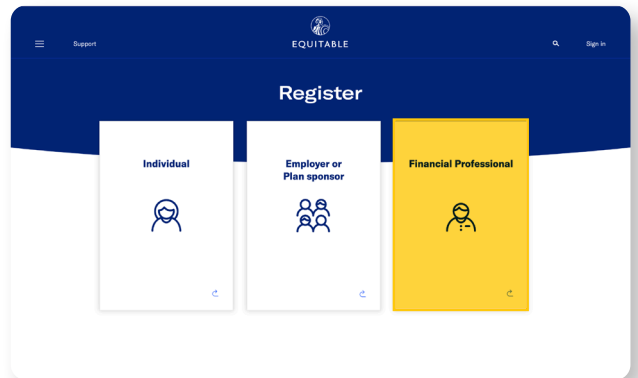
Enjoy 24/7 access to details around your Book of Business, policy alerts and transactions you can initiate easily online.

Get started by registering online

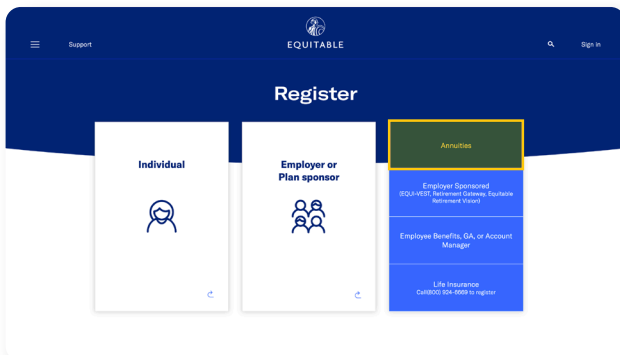
1 Access the equitable.com portal and click on Register Now



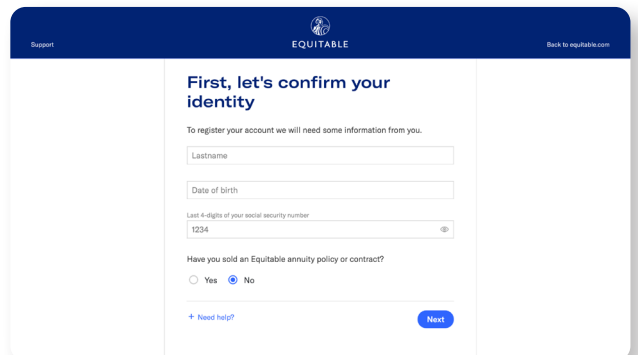
2 Select Financial Professional



3 Then select Annuities

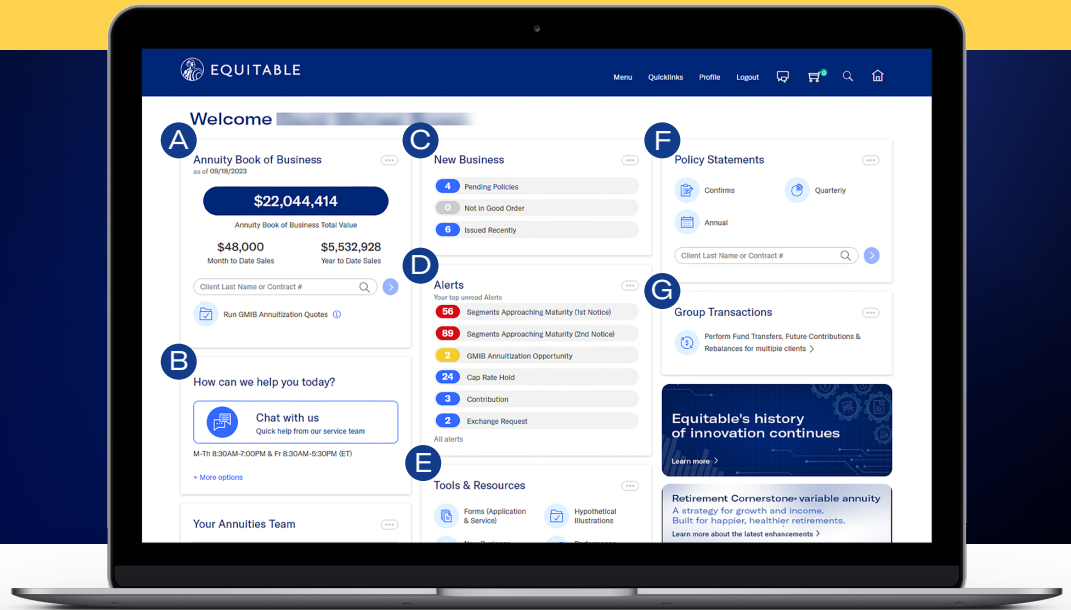


4 Enter your last name, date of birth and the last four digits of your SSN. Proceed to validate and create your credentials.



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- A Book of Business**
- B Click-to-Chat**
- C New Business Tracker**
- D Alerts**
- E Tools & Resources**
- F View Statements**
- G Group Transactions**



A Annuity Book of Business
as of 09/18/2023

\$22,044,414

Annuity Book of Business Total Value

\$48,000 **\$5,532,928**
Month to Date Sales Year to Date Sales

Client Last Name or Contract #

Run GMB Annuity Quotes

- **Search** by client name or contract number
- **View** of entire Book of Business
- Total value of existing Book of Business (tracks month and YTD sales)

B How can we help you today?

Chat with us
Quick help from our inforce service team

M-Th 8:30AM-7:00PM & Fr 8:30AM-5:30PM (ET)

+ More options

- **Click-to-Chat** with individual annuity specialist

E Tools & Resources

- Forms (Application & Service)
- Hypothetical Illustrations
- New Business Tracker
- Performance Center
- Prospecture Literature
- Reports
- Retirement Guide
- Important / Regulatory Info

- **Forms** (Application & Service)
- **Performance Center**

Performance Center

Reports

- Historical segment and investment option data
- Portfolio analyzer tool
- Morningstar Fact Cards
- Reports to help manage your Book of Business

C New Business

- 4 Pending Policies
- 0 Not in Good Order
- 6 Issued Recently

- Track pending new business status
- Application details
- Access to hypothetical illustrations, NAIC training completions and state appointments

F Policy Statements

Confirms Quarterly

Annual

Client Last Name or Contract #

- **Quarterly** statement
- **Annual** statement
- **Confirmation** statement

D Alerts

Your top unread Alerts

- 56 Segments Approaching Maturity (1st Notice)
- 89 Segments Approaching Maturity (2nd Notice)
- 2 GMB Annuity Opportunity
- 24 Cap Rate Hold
- 3 Contribution
- 2 Exchange Request

All alerts

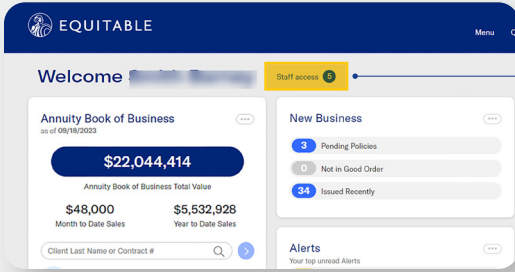
- **Overview of top alerts**
- Color-coded alerts aligned with priority
- Manage all alerts and ability to customize preferences

G Group Transactions

Perform Fund Transfers, Future Contributions & Rebalances for multiple clients >

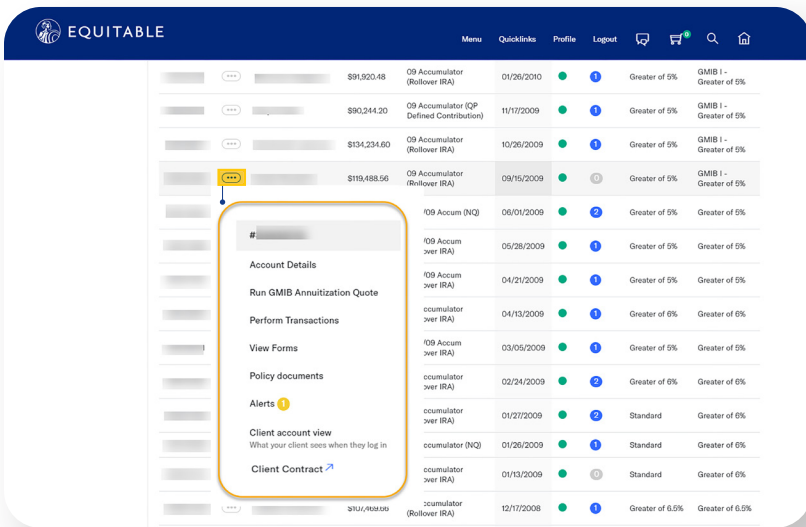
- **Perform trades** in multiple contracts at the same time
- **Fund Transfer, Future Contributions & Rebalances**

Additional features



Staff access*

- Provide staff members access to view Book of Business with their own separate User ID
- * Firm restrictions may apply to access



Redesigned Existing Business and Account Details

- Clean, easy view of full client list and the most pertinent information
- Drop-down menu to access account details, perform transactions, view forms, etc.

Log in to see for yourself at equitable.com.

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