



EQUITABLE

Annuity Portal

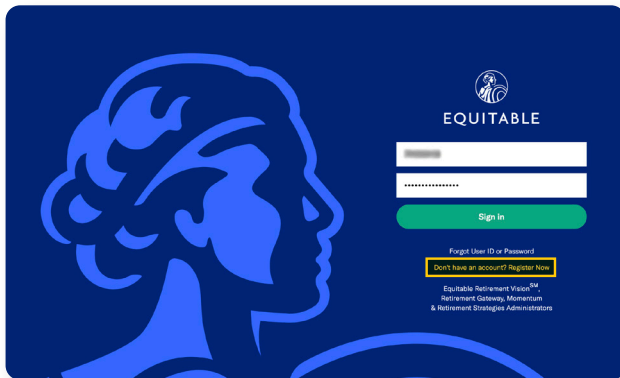
Resource guide

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

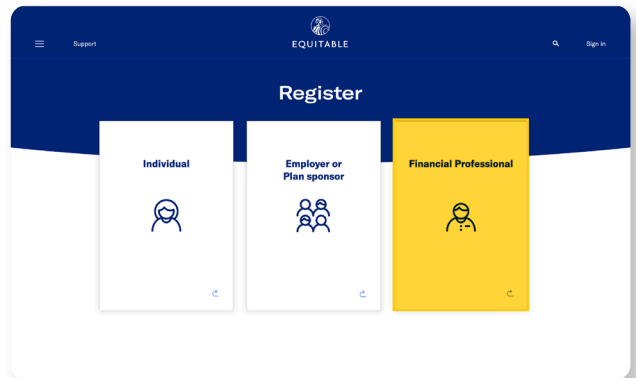
Enjoy 24/7 access to details around your Book of Business, policy alerts and transactions you can initiate easily online.

Get started by registering online

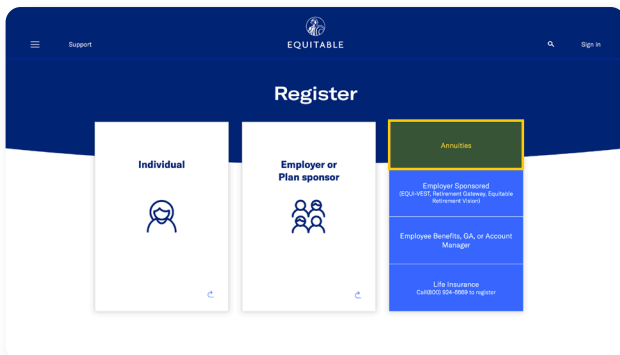
1 Access the equitable.com portal and click on Register Now



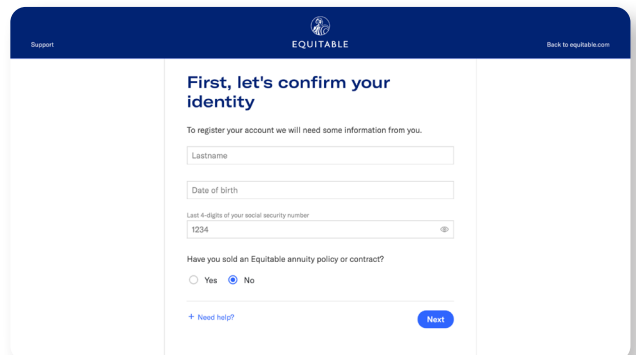
2 Select Financial Professional



3 Then select Annuities

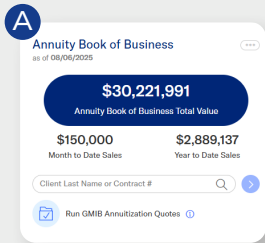
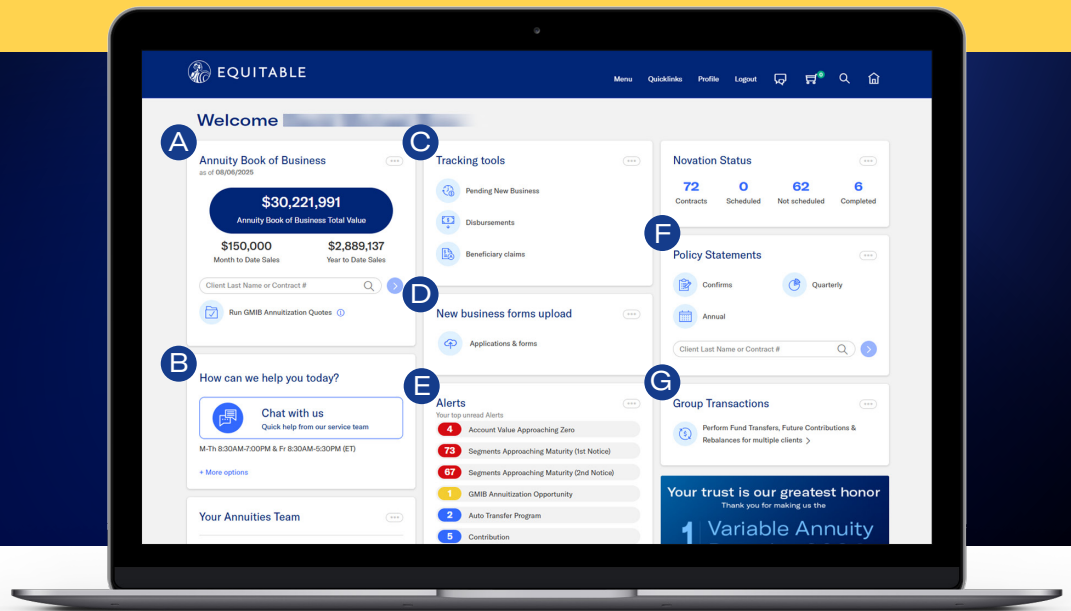


4 Enter your last name, date of birth and the last four digits of your SSN. Proceed to validate and create your credentials.

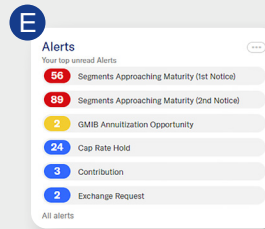


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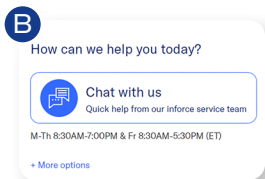
- A Book of Business**
- B Click-to-Chat**
- C Tracking Tools**
- D Forms Upload**
- E Alerts**
- F Policy Statements**
- G Group Transactions**



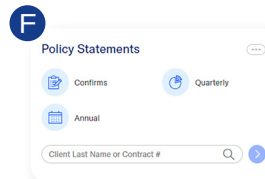
- **Search** by client name or contract number
- **View** of entire Book of Business
- Total value of existing Book of Business (tracks month and YTD sales)



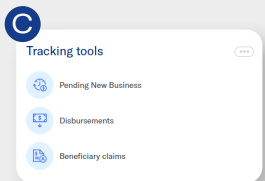
- **Overview of top alerts**
- Color-coded alerts aligned with priority
- Manage all alerts and ability to customize preferences



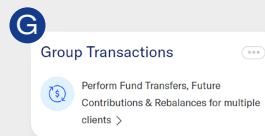
- **Click-to-Chat** with individual annuity specialist



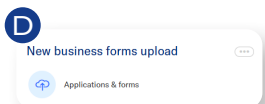
- **Quarterly** statement
- **Annual** statement
- **Confirmation** statements



- **View application status**
- **Track disbursement** and beneficiary claims information



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



- **Upload** new application and supporting paperwork
- Upload amended or missing paperwork

Additional features

Tools & Resources

- Performance Cap Rates
- Hypothetical Illustrations
- Prospectus Literature
- Annuity Tools Center
- Tax FAQ
- Forms (Application & Service)
- Performance Center
- Reports
- Important / Regulatory Info
- Beneficiary Claim Forms

Performance Center

Reports

Tools and Resources

- **Forms** (Application and Service)
- Performance Center
- Historical segment and investment option data
- Portfolio analyzer tool
- Morningstar Fact Cards
- Reports to help manage your Book of Business

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Welcome

Staff access

Annuity Book of Business
as of 06/06/2025

\$30,221,991
Annuity Book of Business Total Value

Tracking tools

- Pending New Business
- Disbursements

Staff access*

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

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Menu Quicklinks Profile Logout

\$91,920.48	09 Accumulator (Rollover IRA)	01/26/2010	Greater of 5%	GMB I - Greater of 5%
\$90,244.20	09 Accumulator (QP Defined Contribution)	11/17/2009	Greater of 5%	GMB I - Greater of 5%
\$134,234.60	09 Accumulator (Rollover IRA)	10/26/2009	Greater of 5%	GMB I - Greater of 5%
\$119,488.56	09 Accumulator (Rollover IRA)	09/19/2009	Greater of 5%	GMB I - Greater of 5%
	09 Accum (NQ)	01/01/2009	Greater of 5%	Greater of 5%
	09 Accum (over IRA)	05/28/2009	Greater of 5%	Greater of 5%
	09 Accum (over IRA)	04/21/2009	Greater of 5%	Greater of 5%
	accumulator (over IRA)	04/13/2009	Greater of 6%	Greater of 6%
	09 Accum (over IRA)	03/05/2009	Greater of 5%	Greater of 5%
	accumulator (over IRA)	02/24/2009	Greater of 6%	Greater of 6%
	accumulator (over IRA)	01/27/2009	Standard	Greater of 6%
	accumulator (NQ)	01/26/2009	Standard	Greater of 6%
	accumulator (over IRA)	01/13/2009	Standard	Greater of 6%
	accumulator (Rollover IRA)	12/17/2008	Greater of 6.5%	Greater of 6.5%

Account Details

Run GMB Annuity Quote

Perform Transactions

View Forms

Policy documents

Alerts

Client account view
What your client sees when they log in

Client Contract

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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