Annuity Portal

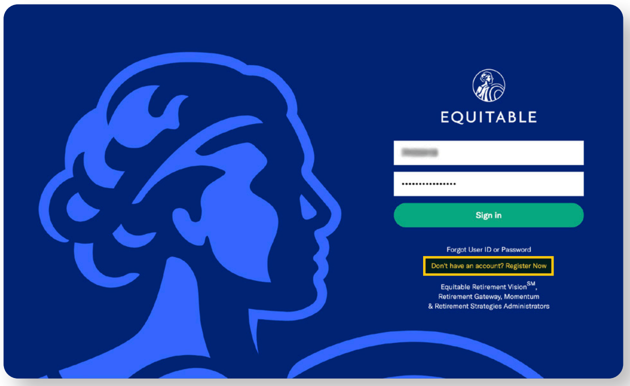
Resource guide

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

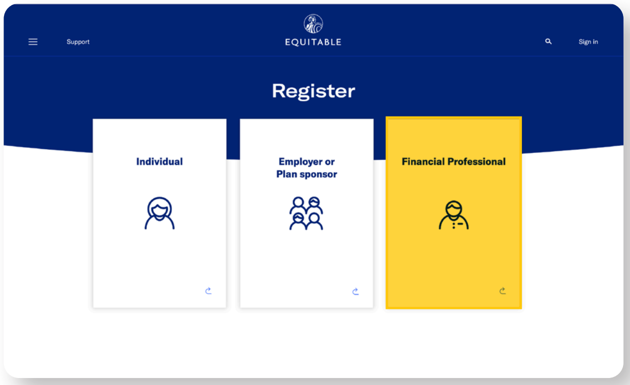
Enjoy 24/7 access to details around your Book of Business, policy alerts and transactions you can initiate easily online.

Get started by registering online

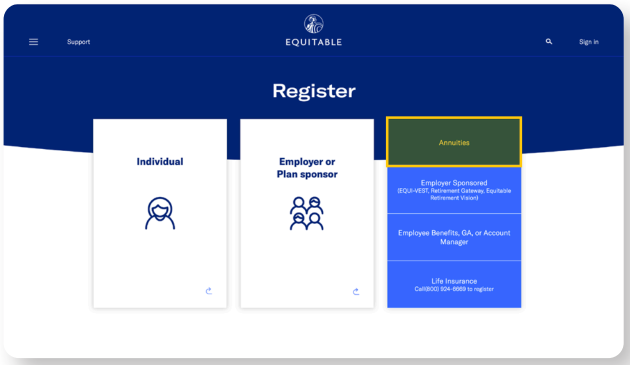
1. **Access the equitable.com portal and click on Register Now**



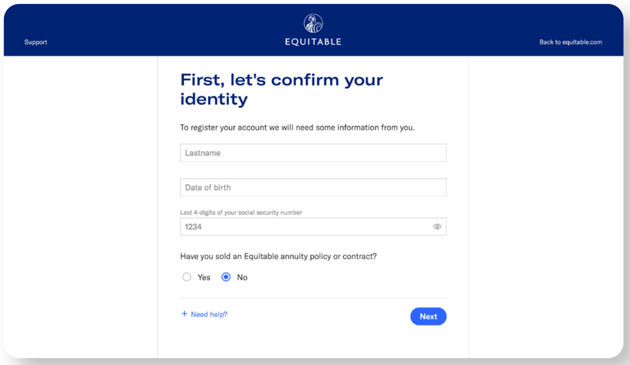
2. **Select Financial Professional**



3. **Then select Annuities**

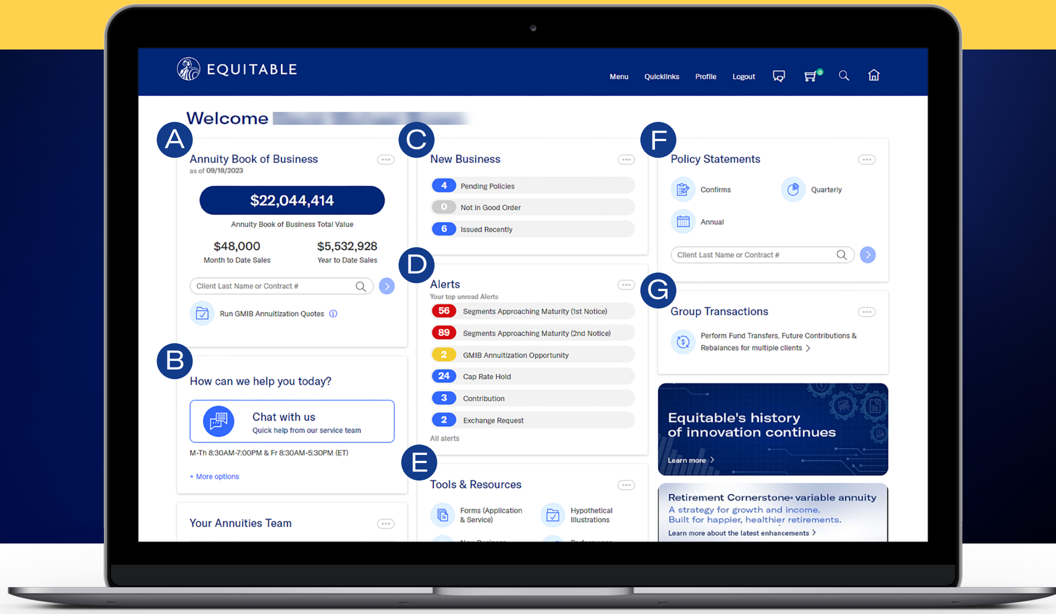


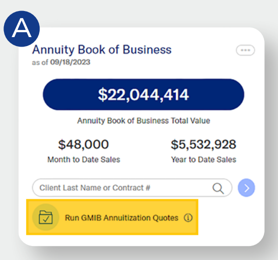
4. **Enter your last name, date of birth and the last four digits of your SSN.** Proceed to validate and create your credentials.



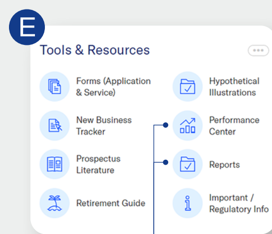
For financial professional use only. Not for use with the general public.

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

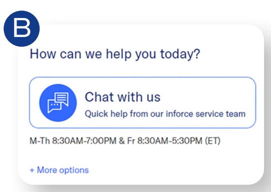




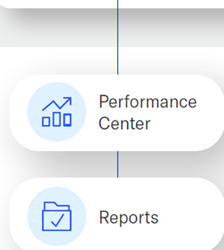
- **Search** by client name or contract number
- **View** of entire Book of Business
- Total value of existing Book of Business (tracks month and YTD sales)



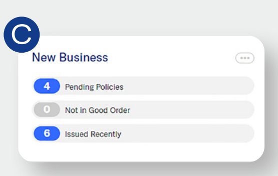
- **Forms** (Application & Service)
- Performance Center



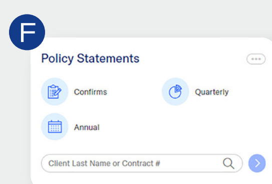
- **Click-to-Chat** with individual annuity specialist



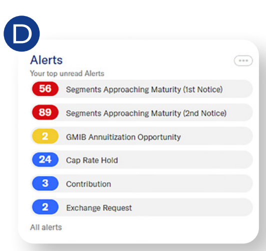
- Historical segment and investment option data
- Portfolio analyzer tool
- Morningstar Fact Cards
- Reports to help manage your Book of Business



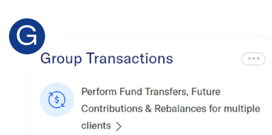
- Track pending new business status
- Application details
- Access to hypothetical illustrations, NAIC training completions and state appointments



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

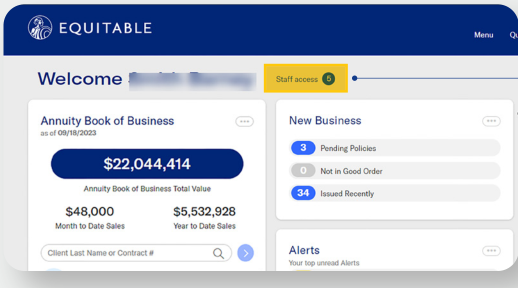


- **Overview of top alerts**
- Color-coded alerts aligned with priority
- Manage all alerts and ability to customize preferences



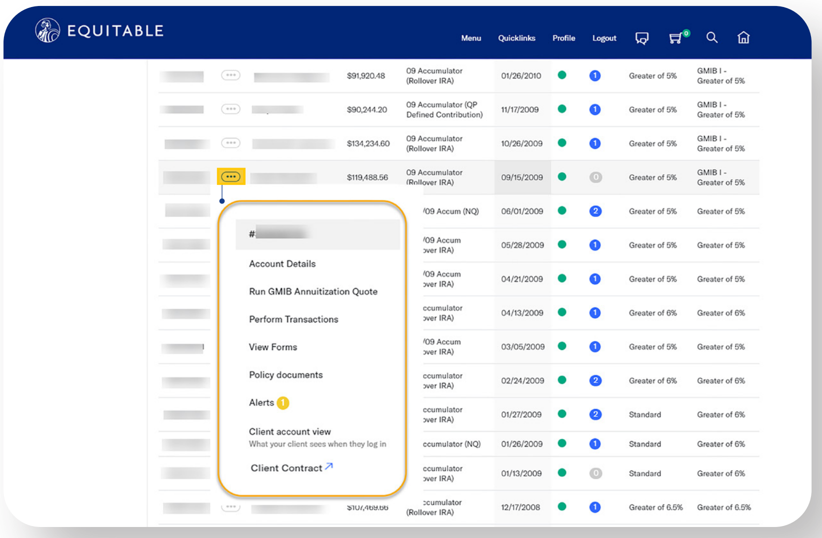
- **Perform trades** in multiple contracts at the same time
- Fund Transfer, Future Contributions & Rebalances

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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