



## EQUITABLE

### **Equitable 2023 Political Engagement Report**

#### **A Note from José Ramón González, Chief Legal Officer and Secretary of Equitable**

I am pleased to announce the publication of Equitable’s 2023 Political Engagement Report.<sup>1</sup> This Report, along with our 2023 ESG Report, demonstrates Equitable’s ongoing commitment to transparency with our clients, our shareholders and other stakeholders. This Report was provided to the Nominating and Corporate Governance Committees of the Boards of Directors of Equitable Holdings, Inc. and Equitable Financial Life Insurance Company. Both Committees are comprised solely of independent directors.

Equitable is committed to constructive dialogue through active engagement with federal, state and local government officials on issues that impact the financial and retirement security of Americans, including tax, securities and insurance matters. We are especially proud of our ongoing advocacy in support of initiatives to strengthen the framework for investment risk regulation in light of evolving investment trends that pose potential threats to life insurer solvency. Our advocacy efforts are undertaken in compliance with applicable laws and regulations, and in accordance with Equitable’s Code of Business Conduct and Ethics and Political Engagement Statement, which are both available [here](#).

This Report details the recipients of all contributions from the federal political action committee sponsored by Equitable Holdings, Inc., Equitable PAC, during the calendar year 2023. Equitable PAC is funded solely by voluntary contributions from eligible employees and financial professionals. Equitable made no political contributions using corporate funds during 2023 and does not contribute to any 501(c)(4) social welfare organizations for the purposes of influencing candidate elections. This Report also discloses trade associations to which Equitable paid annual membership dues of \$50,000 or more and the portion of those funds attributed to political or lobbying activities.<sup>2</sup> Finally, in addition to the portion of its trade association dues attributed to political or lobbying activities, Equitable directly spent \$340,800 on federal lobbying activity in 2023, principally in relation to legislative and regulatory actions relating to tax, securities, and insurance issues.

José Ramón González  
March 26, 2024

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<sup>1</sup> This Report describes the activities of the subsidiaries of Equitable Holdings, Inc. comprising its Equitable franchise, including Equitable Financial Life Insurance Company, Equitable Financial Life Insurance Company of America, and Equitable Advisors, LLC (collectively referred to herein as “Equitable”) and to Equitable Holdings, Inc. where specified. It does not apply to AllianceBernstein L.P., AllianceBernstein Holding L.P., and their subsidiaries (collectively, “AB”). For information relating to AB, please review AB’s Statement on Political Influence [here](#).

<sup>2</sup> Past support of a candidate, PAC, or trade association does not mean that Equitable or Equitable PAC are currently providing similar support, and some support listed in this report may have discontinued.

## Recipients of Contributions from Equitable PAC

NAME OF CANDIDATE / COMMITTEE	AMOUNT
Rep. Pete Aguilar (D-CA)	\$1,000
Rep. Jodey Arrington (R-TX)	\$3,500
Sen. Tammy Baldwin (D-WI)	\$1,000
Rep. Andy Barr (R-KY)	\$1,000
Rep. Joyce Beatty (D-OH)	\$2,500
Sen. Marsha Blackburn (R-TN)	\$2,500
Sen. Sherrod Brown (D-OH)	\$2,500
Sen. Bob Casey (D-PA)	\$2,500
Rep. Emanuel Cleaver (D-MO)	\$1,500
Sen. Kevin Cramer (R-ND)	\$1,500
Rep. Madeline Dean (D-PA)	\$1,000
Rep. Tom Emmer (R-MN)	\$1,500
Rep. Ron Estes (R-KS)	\$3,500
Rep. Randy Feenstra (R-IA)	\$1,000
Rep. Drew Ferguson (R-GA)	\$2,500
Rep. Brian Fitzpatrick (R-PA)	\$1,000
Rep. Virginia Foxx (R-NC)	\$1,000
Rep. Mike Gallagher (R-WI)	\$1,000
Rep. Andrew Garbarino (R-NY)	\$1,000
Rep. Josh Gottheimer (D-NJ)	\$2,500
Sen. Bill Hagerty (R-TN)	\$3,000
Rep. Brian Higgins (D-NY)	\$1,000
Rep. French Hill (R-AR)	\$2,500
Rep. Jim Himes (D-CT)	\$1,000
Rep. Steve Horsford (D-NV)	\$1,000
Rep. Bill Huizenga (D-MI)	\$2,500
Rep. Hakeem Jeffries (D-NY)	\$2,500

<b>NAME OF CANDIDATE / COMMITTEE</b>	<b>AMOUNT</b>
Rep. Dan Kildee (D-MI)	\$1,000
Sen. Angus King (I-ME)	\$1,000
Rep. Darin LaHood (R-IL)	\$2,500
Rep. John Larson (D-CT)	\$3,500
Rep. Blaine Luetkemeyer (R-MO)	\$2,500
Rep. Lucy McBath (D-GA)	\$1,000
Rep. Patrick McHenry (R-NC)	\$2,500
Rep. Carol Miller (R-WV)	\$1,000
Rep. Blake Moore (R-UT)	\$1,000
Rep. Gwen Moore (D-WI)	\$2,500
Rep. Joe Morelle (D-NY)	\$2,500
Rep. Greg Murphy (R-NC)	\$1,000
Rep. Richard Neal (D-MA)	\$2,500
Rep. Wiley Nickel (D-NC)	\$2,000
Rep. Donald Norcross (D-NJ)	\$1,000
Rep. Zach Nunn (R-IA)	\$1,000
Rep. Jimmy Panetta (D-CA)	\$2,500
Rep. Linda Sanchez (D-CA)	\$1,000
Rep. Brad Schneider (D-IL)	\$1,500
Rep. Terri Sewell (D-AL)	\$2,500
Rep. Mikie Sherrill (D-NJ)	\$1,500
Rep. Adrian Smith (R-NE)	\$1,000
Rep. Jason Smith (R-MO)	\$2,500
Sen. Tina Smith (D-MN) [Velvet Hammer PAC]	\$2,500
Rep. Bryan Steil (R-WI)	\$2,500
Rep. Claudia Tenney (R-NY)	\$3,500
Sen. Thom Tillis (R-NC)	\$2,500
Rep. Ann Wagner (R-MO)	\$3,000
Sen. Mark Warner (D-VA)	\$2,500
Rep. Brandon Williams (R-NY)	\$2,000
American Council of Life Insurers PAC	\$5,000
Equality PAC	\$2,500
Insured Retirement Institute PAC	\$5,000
<b>Grand Total</b>	<b>\$121,000</b>

## Trade Associations with Membership Dues of \$50,000 or More

RECIPIENT <sup>3</sup>	TOTAL AMOUNT	ALLOCATION TO LOBBYING AND/OR POLITICAL ACTIVITIES <sup>4</sup>
Alliance for Lifetime Income	\$500,000	\$0
American Council of Life Insurers <sup>5</sup>	\$1,310,435	\$200,496
American Retirement Association	\$173,300	\$25,995
Finseca	\$250,000	\$62,500
Insured Retirement Institute	\$235,200	\$30,576
Investment Company Institute	\$501,538	\$36,110
Life Insurance Council of New York	\$203,600	\$52,936
LL Global, Inc. (LIMRA and LOMA)	\$598,387	\$0

<sup>3</sup> Equitable did not renew its membership in the Association of California Life and Health Insurance Companies for 2024. Membership dues paid for 2023 (invoiced in 2022) are reflected in Equitable's 2022 Political Engagement Report.

<sup>4</sup> Non-deductible portion of membership dues computed pursuant to Section 162(e) of the Internal Revenue Code and reported by trade association to Equitable. Certain allocations were expressed to Equitable as a percentage or estimated percentage of total dues.

<sup>5</sup> Based on aggregate payments by Equitable Financial Life Insurance Company, Equitable Financial Life Insurance Company of America, and Equitable Financial Life & Annuity Company.