THIS FORM IS NOT APPLICABLE FOR SERIES 9.0 CONTRACTS, GENERALLY THOSE APPLIED FOR ON OR AFTER 06/08/09, DEPENDING ON WHEN SERIES 9.0 WAS APPROVED IN YOUR STATE. IF YOUR CONTRACT WAS ISSUED AFTER 06/08/09, PLEASE CALL US TO FIND OUT WHETHER YOU ARE ELIGIBLE TO USE THIS FORM.



Equitable Advisors, LLC (Equitable Financial Advisors in MI & TN) Equitable Distributors, LLC For Assistance Call 800-789-7771

## **Accumulator**® **Variable Annuity Series Rebalancing Election**

**Express Mail:** 

Equitable Financial Life Insurance Company Retirement Service Solutions 500 Plaza Drive, 7th Floor Secaucus, NJ 07094

Regular Mail:

Equitable Financial Life Insurance Company

**Retirement Service Solutions** 

P.O. Box 1547

		Secaucus, NJ 07096-1547		
Owner's Name (First, Middle, Last)		Owner's daytime phone number		
Joint Owner's Name (First, Middle, Last)  Joint Owner's daytime pho				
Annuitant's Name (if other than Owner)	Certificate/Contract Number			
1. Fund Rebalancing The percentage of the value in each investment op on a quarterly, semi-annual, or annual contract yea be re-adjusted to the desired allocation percentage Option 2 cannot be elected if any dollar cost average declining markets and should be periodically revise is this a change to an existing Rebalancing election	r basis. If necessary, the allocation among the varies. Option 1 cannot be elected if General DCA or eraging program is in effect. Rebalancing does not as your needs may change. Changes to the reb	able investment options (and GIO, if applicable) will Select's 12-Month DCA program is in effect. ot assure a profit or protect against a loss in alancing program must be made in writing.		
2. Rebalancing Elections  ☐ Option 1: Only the Variable Investment Options ☐ Quarterly ☐ Semi Annually or ☐ Option 2: The VIOs and the GIO# will be include ☐ Quarterly ☐ Semi Annually or ☐ By checking this box, I authorize the termination Please indicate the date you would like the rebalan must be received on or prior to the business da # N/A Pre-Series '02	Annually  ad in the Asset Rebalancing program. Cannot be ele  Annually  n of my Dollar Cost Averaging program in order to e  cing program to begin. Rebalancing transfers may	ected if the Dollar Cost Averaging program is in effect. elect Asset Rebalancing. not occur after the 28 <sup>th</sup> of the month. <b>This form</b>		
Allocation Among Guaranteed Interest Opplease visit www.equitableonline.com or call 1-80 lf the 100% Principal Guarantee or GWBL is elected. If the 125% Principal Guarantee is elected, only the Rebalancing instructions must include at least INSET ALLOCATION FUNDS	00-789-7771 if you have any questions. d, only the Asset Allocations and Guaranteed Interest e EQ/Moderate Allocation and Guaranteed Interest	est Option (GIO) are available.		

account under Rollover TSA (if applicable). Please see your

contract's prospectus for further details.

## 4. Terms and Conditions

\*\* If there are joint owners, both must sign.

- A. We will transfer balances among your variable investment options (and GIO for Option 2) to arrive at the allocation percentages in Section 3 on each rebalancing date.
- B. Asset Rebalancing does not affect your allocation for future contributions. Effecting a variable investment option or GIO transfer while a rebalancing program is in place will NOT result in the program being changed to reflect the new transfer-implied percentage allocations. The rebalancing allocations will revert to the original allocations you initially requested UNLESS we receive written instructions to specifically change these allocations.
- C. Asset Rebalancing is not available for the fixed maturity options (FMOs).
- D. General dollar cost averaging (DCA) or Select's 12 month DCA program are not available with Option 1. All DCA programs are not available with Option 2.
- E. GIO Inbound Allocation/Transfer Restrictions: No more than 25% of any contribution may be allocated to the GIO. A transfer into the GIO will not be permitted if such transfer would result in more than 25% of the annuity account value being allocated to the GIO, based on the annuity account value as of the previous business day.
- F. GIO Outbound Transfer Restrictions: The maximum amount that may be transferred from the GIO to any investment option in any contract year is the greatest of:
  - a) 25% of the amount in the GIO on the last day of the prior contract year; or,
  - b) the total of all amounts transferred from the GIO to any of the Investment options in the prior contract year; or,
  - c) 25% of amounts transferred/allocated into the GIO during the current contract year.
- G. Asset Rebalancing is not available if the Assured Payment Option or APO Plus is in effect.
- H. This feature will remain in effect until Equitable receives written notice from you requesting that it be terminated or modified.
- I. Rebalancing does not guarantee a profit or protect against loss in a declining market and should be periodically revised as your needs may change.
- J. IN ORDER FOR YOUR REBALANCING REQUEST TO BE PROCESSED, THIS FORM AND ANY OTHER REQUIRED PAPERWORK MUST BE RECEIVED IN THE PROCESSING OFFICE ON OR PRIOR TO THE BUSINESS DAY YOU INDICATED IN SECTION 2. THE REBALANCE WILL OCCUR ON THE BUSINESS DAY YOU INDICATED IN SECTION 2. REQUESTS RECEIVED IN THE PROCESSING OFFICE AFTER 4PM WILL BE PROCESSED ON THE NEXT BUSINESS DAY. PLEASE CONSULT YOUR PROSPECTUS FOR RESTRICTIONS, MINIMUM OR MAXIMUM LIMITATIONS, FEES AND OTHER APPLICABLE INFORMATION RELATING TO YOUR REQUEST.

5. Client Authorization	This section nee making this requ	•	client-authorized Financial Pr	ofessional is			
I agree to and understand the terms	s and conditions of the a	bove optional program for	which I have enrolled.				
X Owner's Signature (if owned by an	entity, show title)		Date				
X Joint Owner** (if applicable)							
** If there are joint owners, both mu	st sign.		Date				
6. Financial Professional Cert	•	*Must be completed if the client-authorized Financial Professional is making this request based on client instructions.					
I hereby certify that this request is being made based on the client's instructions to me.							
Financial Professional's Signature		Branch**	Code Number**	Date			
* A copy of this completed, signed for	orm must be placed in th	ne client file.					

 Rebalancing
 Cat. No. 127526 (06/20)
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 Pre-Series 9.0
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