



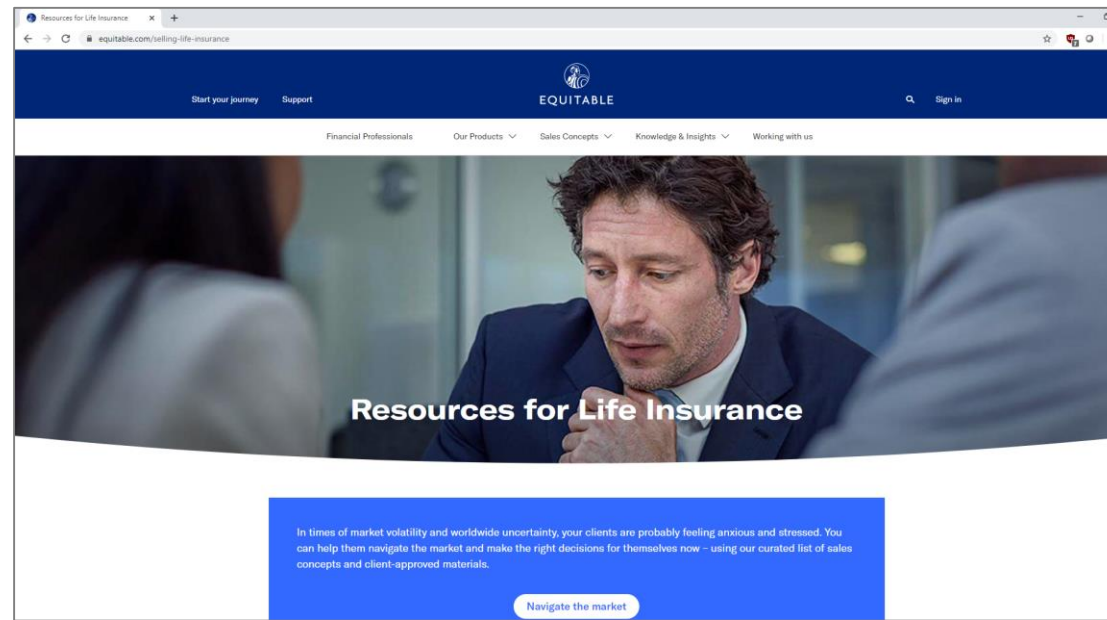
EQUITABLE

# **How to upload documents to an application – a step-by-step guide**



1

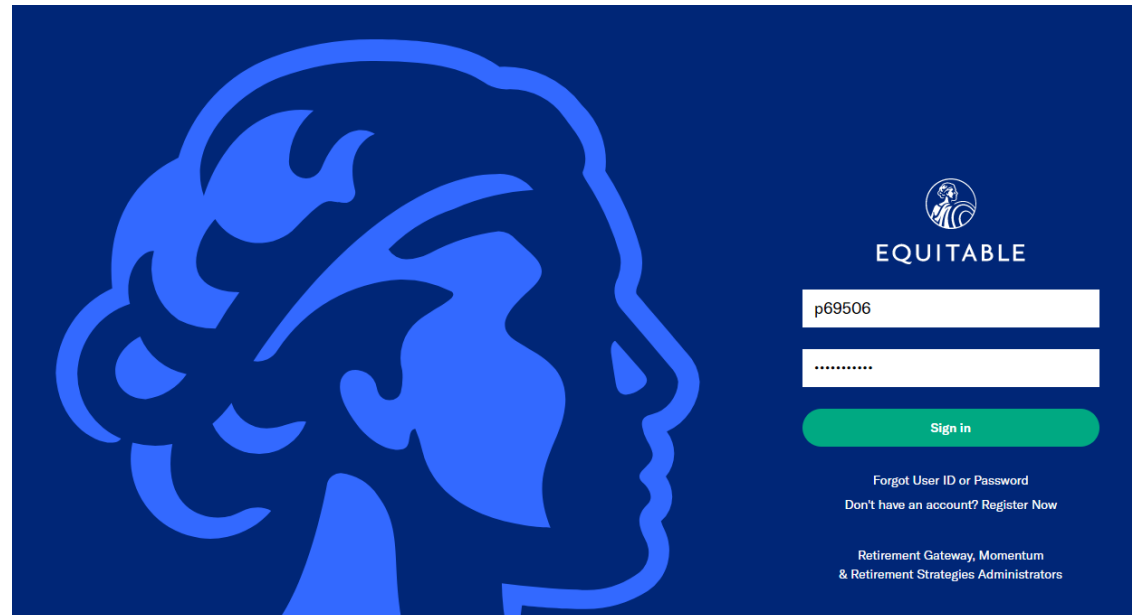
Log in



[www.equitable.com](http://www.equitable.com)


If you need help with  
your Username &  
Password, please  
reach out to

[lifecomp@equitable.com](mailto:lifecomp@equitable.com)



2

This is your  
home screen


  
EQUITABLE

[About Equitable](#) | [Feedback](#) | [My Preferences](#) | [Contact Us](#) | [Help](#) | [Site Map](#) | [Switch to ...](#) | [Log out](#)

[MY BUSINESS](#) | [PRODUCTS](#) | [ADVANCED MARKETS](#) | [FORMS](#) | [PERFORMANCE](#) | [ONLINE TOOLS](#) | [QUICK LINKS](#) | [SEARCH](#)


[Overview](#) | [Book of Business](#) | [AEGIS Illustrations](#) | [Underwriting](#) | [New Business](#) | [Marketing Resources](#) | [What's New](#) | [Why Equitable Now](#)

Welcome Crystal Quicano

 [Printer Friendly](#) | Text Size: [A](#) [A](#)

### Featured Topic

#### 2019 Year-End Deadlines





Information for year-end processing

[Learn more >](#)

### Welcome to Equitable!

We're glad you're here.



 Your one-stop shop for AXA Illustrations

[Run an illustration on AEGIS Web](#)

[AEGIS Desktop Instructions & Download](#)

### Manage Your Life Policies

☒ Pending ☐ In-Force ☐ Informal Requests

#### Open Entire Book of Business

[View all Policies](#)

#### Search by...

☒ Last Name  
☐ Policy No.  
☐ Broker No.

[Go](#)

### Contact Information

For more information on the wide range of life insurance products issued by Equitable please contact us at: 1-800-924-6669

### Save time with electronic life insurance applications and forms.

[Visit the Life e-App Center >](#)

Distributor: AXA Distributors, LLC  
(U)2802659 (10/19) (Exp. 10/21)


SEARCH  
HERE

3

## Access cases

### Featured Topic

#### AXA for Life



Information on all things life insurance

### Contact Information

For more information on the wide range of life insurance products issued by AXA Equitable please contact AXA Distributors at: 1-800-924-6669

## We say it. We do it.

# Extra Interest Credit

## Now .50% on IUL Protect

[Learn more >](#)

## Manage Your Life Policies

☒ Pending ☐ In-Force ☐ Informal Requests

### Open Entire Book of Business

[View all Policies](#)

#### Search by...

☐ Last Name  
☒ Policy No.  
☐ Broker No.

568353019

**ENTER SEARCH  
CRITERIA**

4

View your  
case

In-Force
Pending Business
Informals
Compensation
+ Appointments

### Life Insurance Pending

Click on a policy number to view details.

Search: ☐ Last Name ☒ Policy No. ☐ Broker No. ☐ Firm

[View Informals](#)  
[View all Policies](#)

Policy No.	Policy Holder	Broker/Rep	Product	Face Value	Status	Last Update
568353019	Juneloe, Teste	Walsh, Jennefer	IUL Protect	\$1,000,000	Underwriting in Progress	Jul 18, 2018

Printer Friendly  
Last Refresh Time: N/A  
[Refresh Policy List](#)

CLICK ON  
POLICY #

5

Outstanding  
Requirements

In-Force
Pending Business
Informals
Compensation
+ Appointments

### Life Insurance Pending Detail

[< Back to Pending Policies](#)

Policy Details for: 568353019

Details	Outstanding Requirements	Completed Requirements	Waived Requirements	Correspondences
<b>Policy #:</b> 568353019 <b>Insured:</b> Teste Juneloe <b>Address:</b> sdf sdf Washington, District of Columbia 20001	<b>Plan:</b> IUL Protect Series 159 <b>DOB:</b> 04/04/1958 <b>Issue State:</b> District of Columbia <b>Last Updated:</b> 07/18/2018	<b>Face Amount:</b> \$1,000,000 <b>Gender:</b> Female <b>Status:</b> Underwriting in Progress 07/18/2018		

**Mode:** Annual  
**Est Modal Premium:**  
**Est Min Modal Premium:**  
**Est Target Modal Premium:**  
**Rate Class:**  
**Tobacco Class:**  
**Riders:** Long Term Care Service Rider, No Lapse Guarantee, Living Benefit Rider

**Broker/Rep:** Jennefer Walsh  
**Underwriter:** Ryan Sharp  
**Underwriter Phone #:** 860 409-1343  
**Case Manager:** AWAIT ASSIGNMENT  
**Case Manager Phone #:** 704 341-7000  
**Case Manager eMail:** [await.assignment@axaequitable.com](mailto:await.assignment@axaequitable.com)

CLICK ON  
OUTSTANDING  
REQUIREMENTS

This will get you to the section that shows the requirements and what can be uploaded

6

**Upload  
document**

In-Force  
**Pending Business**  
Informals  
Compensation  
+ Appointments

## Life Insurance Pending Detail

[< Back to Pending Policies](#)

Policy Details for: 568353019

Details	Outstanding Requirements	Completed Requirements	Waived Requirements	Correspondences
<b>Policy No:</b> 568353019 <b>Insured:</b> Teste Junelee <b>Plan:</b> IUL Protect Series 159	<b>Status:</b> Underwriting in Progress 07/18/2018 <b>Last Updated:</b> 07/18/2018			

Action	Requirement	Type	Person	Obtained By	Prevents	Requested	Received	Reviewed
	<b>Paramed Exam PDF</b> Form Number : Paramed Exam - AXA-PARAMED-2016DC	Und	INSD	BGA	Underwriting 07/18/2018 Offer			
<b>Upload</b>	<b>Notice &amp; Consent Form PDF</b> Form Number : Notice & Consent Form- 180-316DC (09/2016)	Und	INSD	BGA	Underwriting 07/18/2018 Offer			
<b>Upload</b>	<b>Indexed Universal Life Questionnaire (Section B) PDF</b> Form Number : Indexed Universal Life Questionnaire (Section B) MLOA-PIUL-2017	Und	INSD	BGA	Underwriting 07/18/2018 Offer			

**If the document is available to be uploaded, this notification will be placed under the Action column**

7

**Follow  
prompts to  
complete  
the process**

Browse file to upload document:

Browse File
Close

\*Please note that the file size needs to be lower than 10MB.



File Name: Notice & Consent Form.pdf
Remove

Cancel
Upload



The following document have been uploaded successfully:  
file\_name\_Notice & Consent Form.pdf

OK

8

**Final step:  
Check Status**

In-Force

**Pending Business**

Informals

Compensation

+ Appointments

## Life Insurance Pending Detail

[Printer Friendly](#)

[< Back to Pending Policies](#)

Policy Details for: 568353019

Details	Outstanding Requirements	Completed Requirements	Waived Requirements	Correspondences
Policy No:	568353019	Status:	Underwriting in Progress 07/18/2018	
Insured:	Teste Juneloe	Last Updated:	08/01/2018	
Plan:	IUL Protect Series 159			

Action	Requirement	Type	Person	Obtained By	Prevents	Requested	Received	Reviewed
	<a href="#">Notice &amp; Consent Form PDF</a>	Und	INSD	BGA	Underwriting	07/18/2018	08/01/2018	
	Form Number : Notice & Consent Form- 180-316DC (09/2016)				Offer			
	<i>Upload status: In progress</i>							
	<i>Notice &amp; Consent Form.pdf</i>							

**UPLOADING  
STATUS\***

\* Documents can take from  
**10 Minutes to 2 Hours**  
to upload





EQUITABLE

[Start your journey](#)

[Support](#)



[Sign in](#)

[Financial Professionals](#)

[Our Products](#) ▼

[Sales Concepts](#) ▼

[Knowledge & Insights](#) ▼

[Working with us](#)

# Resources for Life Insurance

Life insurance products are issued by Equitable Financial Life Insurance Company (New York, NY) or Equitable Financial Life Insurance Company of America, an Arizona Stock Corporation with its main administration office in Jersey City, NJ and co-distributed by affiliates Equitable Network, LLC (Equitable Network Insurance Agency of California in CA; Equitable Network Insurance Agency of Utah in UT; Equitable Network of Puerto Rico, Inc. in PR), and Equitable Distributors, LLC., New York, NY.

Equitable is the brand name of Equitable Holdings, Inc and its family of companies, including Equitable Financial Life Insurance Company (NY, NY), Equitable Financial Life Insurance Company of America (AZ stock company, administrative office: Jersey City, N.J.), Equitable Advisors, LLC (member FINRA, SIPC) (Equitable Financial Advisors in MI and TN), and Equitable Distributors, LLC. The obligations of Equitable Financial Life Insurance Company and Equitable Financial Life Insurance Company of America are backed solely by their claims paying ability.

For Financial Professional Use Only / Not for Distribution to the Public.





EQUITABLE