



EQUITABLE

For Assistance: Call (800) 628-6673
Monday – Thursday 8:00 a.m. – 7:00 p.m. EST
Friday 8:00 a.m. – 5:00 p.m. EST
www.equitable.com

Current Online Transactions: Address Changes,
Allocation Changes, Dollar Cost Averaging Set Ups,
Inquiries, Systematic Asset Rebalancing, Transfers

EQUI-VEST®

Variable Annuity Series

Direct Transfer/Contract Exchange or Direct Rollover of TSA Assets to Another Carrier

Express Mail:
Equitable
EQUI-VEST Processing Office
100 Madison St., Suite 1000
Syracuse, N.Y. 13202
Regular Mail:
Equitable
EQUI-VEST Processing Office
P.O. Box 4956
Syracuse, N.Y. 13221

“Important Information if You Are Currently Enrolled in the Semester Strategies Program:”

If you are requesting either a Direct Transfer, Contract Exchange, Direct Rollover from TSA, Rollover Conversion from TSA or Partial Transfer/Exchange or Rollover and choose to remain in the Semester Strategies program, your request will be satisfied from the amounts in variable investment options and the guaranteed interest option of the applicable model portfolio first. Your investments will be temporarily heavily concentrated in the Structured Investment Option until the Semester Strategies program rebalances your investments to mirror the model portfolio’s allocations prior to the request, typically a 12-month duration.

If you would like to terminate your participation in the Semester Strategies program, go to www.equitable.com, contact your financial professional or complete the form, Semester StrategiesSM Change & Termination Form, catalog #152166.

PLEASE PRINT

1. Owner’s Information		
Certificate/Contract Number	Daytime Phone Number	Mobile Phone Number
Owner/Annuitant’s Name	Social Security Number	
Email Address		
Address Number and Street	Apt/Suite/Floor	
City	State	Zip Code
<input type="checkbox"/> Please check if this is an Address Change.		

2A. Type of Transaction	Check One Transaction
<p>1. Direct Transfer:</p> <p><input type="checkbox"/> TSA to TSA — Direct plan-to-plan transfer from one 403(b) Plan to another 403(b) Plan. Both your former employer (or plan administrator or other authorized person) and your current employer (or plan administrator or other authorized person) will need to authorize this transaction in Section 5B.</p> <p>2. Contract Exchange:</p> <p><input type="checkbox"/> TSA to TSA — Contract exchange from one TSA annuity contract to another Internal Revenue Code Section 403(b) annuity contract (including a 403(b)(7) custodial account) within the same plan. We will need the authorization of the employer which sponsored your TSA contract, unless Equitable has been provided with documentation as to approved providers from the employer and the transferee provider is included in such documentation. See Section 5B.</p> <p>3. Direct Rollover from TSA:</p> <p><input type="checkbox"/> Direct Rollover in accordance with Internal Revenue Code Sections 401(a)(31), 402, 403(b) and other applicable tax rules from a TSA annuity contract into another eligible retirement plan for example, a traditional IRA. The employer (or plan administrator or other authorized person) sponsoring the plan which is the source of funds, will need to authorize this transaction in Section 5B. If the funds are going to an eligible retirement plan which is not an IRA, your current employer (or plan administrator or other authorized person) will also need to authorize this transaction in Section 5B. Note: We cannot process this request if funds are subject to withdrawal restrictions.</p> <p>Destination of Funds — Indicate Type of Retirement Plan:</p> <p><input type="checkbox"/> Qualified Plan <input type="checkbox"/> IRA <input type="checkbox"/> Governmental 457 EDC <input type="checkbox"/> TSA</p> <p>4. Rollover Conversion from TSA:</p> <p><input type="checkbox"/> Rollover Conversion to Roth IRA — Conversion rollover from a TSA annuity contract into a Roth IRA issued by another carrier. The employer (or plan administrator or other authorized person) sponsoring the plan which is the source of funds will need to authorize this transaction in Section 5B. Note: We cannot process this request if funds are subject to withdrawal restrictions.</p>	

2B. Amount to be Transferred/Exchanged or Rolled Over*

(Check One Box Only)

Partial Transfer/Exchange or Rollover of \$ _____ (A minimum Annuity Account Value must remain in the Contract. See the prospectus for details.)

All Sources Pre-Tax Funds Only Roth Funds Only

If you wish specific dollar amounts to be withdrawn from the Guaranteed Interest Option and/or the Variable Investment Options, complete below. If you do not complete this section, amounts will be withdrawn on a pro rata basis. Initial contributions and/or transfers to the Personal Income Benefit (PIB) Variable Investment Options can only be made by using the applicable "Selection of the Personal Income Benefit (PIB) Form" located on eDOX.

Asset Allocation	Guaranteed-Fixed	\$ _____ EQ/Large Cap Growth Managed Volatility (77*)
EQ Allocation	\$ _____ Guaranteed Interest Option (A1*)	\$ _____ EQ/Large Cap Value Index (49*)
\$ _____ EQ/Aggressive Allocation (18*)	International/Global Stocks	\$ _____ EQ/Large Cap Value Managed Volatility (89*)
\$ _____ EQ/Aggressive Growth Strategy (9Z*)	\$ _____ 1290 VT Low Volatility Global Equity (9W*) ⁷	\$ _____ EQ/Loomis Sayles Growth (34*)
\$ _____ EQ/Balanced Strategy (8Q*)	\$ _____ 1290 VT SmartBeta Equity (9C*)	\$ _____ EQ/T. Rowe Price Growth Stock (32*)
\$ _____ EQ/Conservative Allocation (15*)	\$ _____ EQ/Emerging Markets Equity PLUS (8W*)	\$ _____ EQ/Value Equity (81*)
\$ _____ EQ/Conservative Growth Strategy (8R*)	\$ _____ EQ/Global Equity Managed Volatility (78*)	\$ _____ Fidelity® VIP Equity Income (7S*) ^{2,5}
\$ _____ EQ/Conservative-Plus Allocation (16*)	\$ _____ EQ/International Core Managed Volatility (88*)	\$ _____ Invesco V.I. Main Street Fund (7Q*) ^{2,5}
\$ _____ EQ/Conservative Strategy (8S*)	\$ _____ EQ/International Equity Index (TN*) ¹	Large Cap Stocks
\$ _____ EQ/Moderate Allocation (T4*)	\$ _____ EQ/International Managed Volatility (7N*)	\$ _____ Invesco V.I. Diversified Dividend (8B*) ^{2,5}
\$ _____ EQ/Moderate Growth Strategy (8O*)	\$ _____ EQ/International Value Managed Volatility (73*)	\$ _____ MFS® Investors Trust (7P*) ⁵
\$ _____ EQ/Moderate-Plus Allocation (17*)	\$ _____ EQ/Invesco Global (6A*)	\$ _____ MFS® Massachusetts Investors Growth Stock (8I*) ⁵
Target Allocation	\$ _____ EQ/Invesco International Growth (9N*) ⁵	\$ _____ Multimanager Aggressive Equity (T2*)
\$ _____ Target 2015 Allocation (6G*)	\$ _____ EQ/Lazard Emerging Markets Equity (9Q*) ⁵	Personal Income Benefit (PIB) Variable Investment Options
\$ _____ Target 2025 Allocation (6H*)	\$ _____ EQ/MFS International Growth (26*)	\$ _____ PIB EQ/AB Dynamic Moderate Growth (Q2*) ⁴
\$ _____ Target 2035 Allocation (6I*)	\$ _____ EQ/MFS International Intrinsic Value (9R*) ⁵	\$ _____ PIB EQ/Balanced Strategy (Q3*) ⁴
\$ _____ Target 2045 Allocation (6J*)	Large Cap Stocks	\$ _____ PIB EQ/Conservative Growth Strategy (Q4*) ⁴
\$ _____ Target 2055 Allocation (8Z*)	\$ _____ 1290 VT Equity Income (33*)	\$ _____ PIB EQ/Conservative Strategy (Q5*) ⁴
Other Asset Allocation	\$ _____ 1290 VT Socially Responsible (92*)	\$ _____ PIB EQ/Moderate Growth Strategy(Q1*) ⁴
\$ _____ 1290 VT DoubleLine Dynamic Allocation (8U*)	\$ _____ EQ/500 Managed Volatility (7M*)	Sector/Specialty
\$ _____ EQ/AB Dynamic Moderate Growth (8P*)	\$ _____ EQ/Capital Group Research (86*) ³	\$ _____ 1290 VT Convertible Securities (9X*) ⁷
\$ _____ EQ/All Asset Growth Allocation (7H*)	\$ _____ EQ/ClearBridge Large Cap Growth (83*) ³	\$ _____ 1290 VT GAMCO Mergers & Acquisitions (25*) ³
Bonds	\$ _____ EQ/ClearBridge Select Equity Managed Volatility (6F*)	\$ _____ EQ/Invesco Global Real Assets (9M*) ⁵
\$ _____ 1290 VT DoubleLine Opportunistic Bond (9F*)	\$ _____ EQ/Common Stock Index (T1*)	\$ _____ EQ/MFS Technology (9S*) ⁵
\$ _____ 1290 VT High Yield Bond (8X*)	\$ _____ EQ/Equity 500 Index (TE*)	\$ _____ EQ/MFS Utilities Series (9T*) ⁵
\$ _____ EQ/Core Bond Index (96*)	\$ _____ EQ/Fidelity Institutional AM® Large Cap (9K*) ^{5,8}	\$ _____ EQ/Wellington Energy (9O*) ⁵
\$ _____ EQ/Core Plus Bond (TH*)	\$ _____ EQ/Franklin Rising Dividends (9U*) ⁷	\$ _____ Multimanager Technology (67*)
\$ _____ EQ/Intermediate Government Bond (TI*) ¹	\$ _____ EQ/Invesco Comstock (07*)	\$ _____ PIMCO VIT CommodityRealReturn® Strategy (8E*) ^{2,5}
\$ _____ EQ/PIMCO Global Real Return (8Y*)	\$ _____ EQ/JPMorgan Value Opportunities (72*)	\$ _____ Templeton Global Bond VIP (8F*) ^{2,5}
\$ _____ EQ/PIMCO Ultra Short Bond (28*)	\$ _____ EQ/Large Cap Core Managed Volatility (85*)	\$ _____ VanEck VIP Global Resources (8N*) ⁵
\$ _____ EQ/Quality Bond PLUS (TQ*)	\$ _____ EQ/Large Cap Growth Index (82*)	
\$ _____ American Funds Insurance Series The Bond Fund of America (8V*) ⁵		
\$ _____ Invesco V.I. High Yield (8L*) ⁵		
\$ _____ Ivy VIP High Income (8G*) ⁹		
\$ _____ Multimanager Core Bond (69*)		
Cash Equivalents		
\$ _____ EQ/Money Market (T3*)		

2B. Amount to be Transferred/Exchanged or Rolled Over* (Continued)

Small/Mid Cap Stocks		\$ _____ EQ/Mid Cap Index (55*)	\$ _____ Segment Holding Account for Russell 2000 1yr -10% Buffer (V7*) ⁴
\$ _____ 1290 VT GAMCO Small Company Value (37*)		\$ _____ EQ/Mid Cap Value Managed Volatility (79*)	\$ _____ Segment Holding Account for Russell 2000 3yr -20% Buffer (V9*) ^{4,6}
\$ _____ 1290 VT Microcap (9V*) ⁷		\$ _____ EQ/Morgan Stanley Small Cap Growth (9Y*)	\$ _____ Segment Holding Account for Russell 2000 5yr -20% Buffer (VB*) ^{4,6}
\$ _____ 1290 VT Small Cap Value (9D*)		\$ _____ EQ/Small Company Index (97*)	\$ _____ Segment Holding Account for S&P 500 1yr -10% Buffer (V1*) ⁴
\$ _____ EQ/400 Managed Volatility (7L*)		\$ _____ Fidelity VIP Mid Cap (7U*) ^{2,5}	\$ _____ Segment Holding Account for S&P 500 3yr -20% Buffer (V3*) ^{4,6}
\$ _____ EQ/2000 Managed Volatility (7K*)		\$ _____ Invesco V.I. Main Street Mid Cap Fund® (7T*) ⁵	\$ _____ Segment Holding Account for S&P 500 5yr -20% Buffer (V5*) ^{4,6}
\$ _____ EQ/AB Small Cap Growth (TP*)		\$ _____ Invesco V.I. Small Cap Equity (7X*) ⁵	
\$ _____ EQ/American Century Mid Cap Value (9J*) ^{2,5,7}		\$ _____ Ivy VIP Small Cap Growth (7Y*) ⁹	
\$ _____ EQ/Franklin Small Cap Value Managed Volatility (6E*)		Structured Investment Option	
\$ _____ EQ/Goldman Sachs Mid Cap Value (9L*) ⁵		\$ _____ Segment Holding Account for MSCI EAFE 1yr -10% Buffer (VD*) ⁴	
\$ _____ EQ/Janus Enterprise (08*)			
\$ _____ EQ/MFS Mid Cap Focused Growth (9P*) ⁵			

* The number in parenthesis is shown for data input only.

¹ Not available for EQUI-VEST (Series 201).

² Available for EQUI-VEST (Series 201) and EQUI-VEST Strategies (Series 901) only.

³ Not available for EQUI-VEST (Series 201) and EQUI-VEST Strategies (Series 901).

⁴ Available for EQUI-VEST (Series 201), EQUI-VEST Strategies (Series 900) and EQUI-VEST Strategies (Series 901) only.

⁵ **VIT funds are not available in Texas for public schools and open enrollment charter schools (K-12).**

⁶ Not available in New Hampshire.

⁷ Available for EQUI-VEST (Series 800 and 801) only.

⁸ Fidelity Institutional AM is a Registered Mark of FMR LLC. Used with permission.

⁹ On or about July 1, 2021, Ivy VIP High Income and Ivy VIP Small Cap Growth will be renamed Delaware Ivy VIP High Income and Delaware Ivy VIP Small Cap Growth respectively.

- Fixed Maturity Option (FMO) — Specify the Period and Amount of Withdrawal. Funds will be withdrawn from the FMO only when there are insufficient funds in the other investment options under the contract to satisfy the transfer/exchange or partial rollover, if the FMO is the only investment option selected, or if an amount has been specified to be withdrawn from the FMO as indicated below. If money is withdrawn from the FMO prior to maturity, it will be subject to a market value adjustment and withdrawal charges, if applicable.

Fixed Maturity Option – Period _____ \$ _____ Fixed Maturity Option – Period _____ \$ _____
 maturity year maturity year maturity year maturity year

Fixed Maturity Option – Period _____ \$ _____ Fixed Maturity Option – Period _____ \$ _____
 maturity year maturity year maturity year maturity year

2B. Amount to be Transferred/Exchanged or Rolled Over* (Continued)**(Check One Box Only)**

- Total Transfer/Exchange or Rollover** of the entire cash value of the Contract number in Section 1. (The Contract must be returned with this form.)
- Check here if you selected a total transfer/exchange or rollover and are unable to locate your contract. Please note, if Roth funds are present in the contract, these funds will also be included in the Total Transfer/Rollover.

* Applicable withdrawal charges will be deducted when the transfer/exchange or rollover is processed. If you have an outstanding loan balance on your annuity contract, this may adversely affect your ability to transfer/exchange or roll over funds. Please consult your tax adviser. TSA funds subject to the Internal Revenue Code 403(b)(11) withdrawal restrictions cannot be directly rolled over unless an Internal Revenue Code exception applies. Contact the appropriate processing office for details.

3. Acceptance of Transfer/Exchange or Rollover**To be completed by successor fiduciary**

This section must be completed by the issuer of the Internal Revenue Code Section 403(b) annuity contract or 403(b) (7) custodial account that will receive the direct TSA transfer/contract exchange or other eligible retirement plan that will receive the direct rollover (generally "successor fiduciary").

NOTE: This is the only form that Equitable will accept for direct transfer/contract exchange or direct rollover requests.

The amount specified in Section 2B should be sent directly to:

Name of Successor Fiduciary

Address

City/State/Zip Code

Contact Person or Attention of (Department)

Phone Number

Contract Number

I certify that I am an officer of the Successor Fiduciary or New Carrier named in this Section 3. By signing below I certify that I have performed due diligence to verify the identity of the individual named in Section 1, and that I am authorized to accept the funds transferred, rolled over or exchanged as requested in Section 2A in accordance with one of the applicable transactions below. **(check one only)**

1. The transferred/exchanged TSA funds will be applied to an Internal Revenue Code Section 403(b) annuity contract as provided in Treas. Reg. Sec. 403(b)-10 with the approval of the employer.
- If this is a direct transfer/contract exchange the successor fiduciary acknowledges:
- the contract issued or exchanged from the Equitable 403(b) contract will be a 403(b) contract or 403(b)(7) custodial account on behalf of the owner named in Section 1.
 - the successor fiduciary (named above) and the Current Employer named in Section 5B have agreed to enter into an information sharing agreement before January 1, 2009 within the meaning of Treas. Reg. Sec. 403(b)-10.
2. This direct rollover will be applied to an eligible retirement plan within the meaning of Internal Revenue Code Section 402(c)(8)(B) and the plan accepts this kind of rollover.
3. This conversion rollover will be applied to a Roth IRA with my new carrier. I understand that Equitable will file Form 1099-R and my new carrier will file Form 5498.

Type or Print Name of Certifying Officer

Certifying Officer's Title

Certifying Officer's Signature

Date

4. Representations and Acknowledgements (To be completed by annuitant/owner, see exception for spouses in 4B.)

A. For Direct TSA Transfers/Contract Exchanges

By my signature below, I acknowledge:

- Equitable has informed me that: the Treasury Department and the IRS have issued final Treasury Regulations under Section 403(b) of the Internal Revenue Code on July 26, 2007 and these regulations will revoke individual-initiated Rev. Rul 90-24 direct transfers from one 403(b) TSA annuity contract to another 403(b) TSA annuity contract as of January 1, 2009. Under Treas. Reg. Sec. 403(b)-10, all 403(b) TSA contracts must be part of an employer plan as of January 1, 2009. If a 403(b) TSA contract is issued after September 24, 2007 as a direct transfer/contract exchange:
 - The plan under which the contract is issued must provide for the transfer;
 - The accumulated benefit under the transferee contract must be at least equal to the accumulated benefit immediately before the transfer; and
 - The issuer of the transferee contract must be an approved provider under the employer's plan or the employer must have an information sharing agreement established with the issuer of the transferee contract by January 1, 2009.
- If these conditions are not met by January 1, 2009 the 403(b) contract issued in the post-September 24, 2007 transfer/exchange may become taxable at that time and no further tax-free exchanges may be made from that contract to another 403(b) contract. Further, no rollovers may be made from that contract to an eligible retirement plan such as an IRA.

B. For Direct Rollovers

By my signature, I represent that:

- I have checked with the Plan Administrator and have determined that the plan accepts rollovers of this type. I have discussed this transaction with my tax advisor, and I understand that the funds will be subject to the rules of the new plan or contract.
- I am not rolling over any after-tax contributions, except as specifically permitted and documented.
- I have taken the required minimum distribution, if any, pursuant to Internal Revenue Code Section 401(a)(9) and related federal tax rules.
- The Successor Fiduciary's plan or contract named in Section 3 qualifies as an eligible retirement arrangement.
- I acknowledge having received, read and understood, a notice from the Plan Administrator or Payor, which explains the federal income tax rules and options which apply to eligible rollover distributions, including a description of the direct rollover option. Even if I have not received this explanation at least 30 days before I request the distribution to be made, as required by the IRS, I am nevertheless affirmatively electing to make a direct rollover.
- If you are neither the Owner nor the Annuitant, check whichever applies:

I am eligible to make this direct rollover as:

- surviving spouse beneficiary of deceased Annuitant, or
- spouse or former spouse receiving distribution under a Qualified Domestic Relations Order of "QDRO."
(To process this, we must receive directions from the Plan Administrator and receive a copy of the QDRO.)

4. Representations and Acknowledgements

C. For Conversion Rollovers

Equitable is required to withhold federal income tax on payments from annuity contracts which may be included in gross income. Please check the appropriate box below and provide your U.S. residence address and your Taxpayer's Identification Number to elect out of withholding.

I wish to elect out of withholding. Under penalty of perjury, I certify that the following Taxpayer Identification Number is correct: S.S.N E.I.N. Other_____

I wish to have 20% withheld from my conversion amount.

If your address of record is not a U.S. residence address, complete the following statement:

(check one): I am a U.S. citizen. I am not a U.S. citizen, I reside in_____ (name of country)

If you are foreign, you may need to complete additional tax forms before your transaction can be processed.

By my signature, I represent that:

- I understand that if I elect out of withholding, 100% of the amount requested to be converted will be applied to my Roth IRA.
- I understand that if I do not elect out of withholding, the amount of deemed withdrawal from my traditional IRA, or Applicable Plan, net of the appropriate amount of federal and any applicable state income tax withheld, will be forwarded to my new carrier for application to my new Roth IRA.
- The Successor Fiduciary's annuity contract or account named in Section 3, qualifies as an Internal Revenue Code Section 408 individual retirement arrangement or if applicable, a Roth IRA under IRC Section 408A.

D. For All Transactions

By my signature below, I acknowledge that:

- I am the Owner of the Contract listed in Section 1. If I am not, my interest is derived from a participant in a 403(b) plan and the employer or Plan Administrator has approved this transaction in Section 5B;
- Withdrawal charges as specified in the Contract may be imposed on the Annuity Account Value of my Annuity Contract prior to this transaction and, acknowledge that it may not be in my best interest to begin a new withdrawal charge schedule under a new Contract or other arrangement with the Successor Fiduciary;
- Any higher investment return which may occur as a result of this transaction may be outweighed by applicable withdrawal charges assessed against the Annuity Account Value of my Annuity Contract specified in Section 1;
- I understand that I am responsible for determining my eligibility to transfer/exchange or roll over within the limits set forth by tax laws, related regulations and plan agreements. I assume responsibility for any tax consequences or penalties that may apply to the transfer/exchange or roll over of my assets.
- Equitable has not given me tax advice in connection with this transaction and has directed me to consult with my own tax or legal adviser and, I hold Equitable harmless from any income or excise tax liability, including penalties, negative investment experience and interest as a result of this transaction.
- Equitable will deduct a processing fee of up to \$65, depending on Contract market and series.
- I understand that the direct transfer/exchange or direct rollover will be effective on the date that this form, properly completed with all required signatures is received at Equitable's Processing Office. Any properly completed and signed form received in Equitable's EQUI-VEST Processing Office after 4:00 PM Eastern Time or after an early close of regular trading on the NYSE, will be effective the next business day. I also understand that upon receipt of the properly completed forms, Equitable has 5 business days to process this request.
- I hereby authorize Equitable to process this direct transfer/contract exchange or direct rollover transaction.

Signature of Owner/Participant

Date

Print Name of Spouse (if applicable)
(See Section 4B)

Signature of Spouse

Date

5A. Spousal Consent for Plans subject to ERISA

(Important: This section must be witnessed by a Notary Public or Plan Administrator.)

If the Annuitant under the Contract identified in Section 1 is married and is a participant in an Internal Revenue Code Section 403(b) plan which is subject to ERISA, the Annuitant's spouse is entitled to benefits under this arrangement in accordance with the Retirement Equity Act of 1984 ("REA"). Moreover, REA requires that the spouse consents to any direct rollover transaction. Accordingly, one of the following, as applicable, should be completed and witnessed:

1. I, the named Annuitant of the Contract identified in Section 1, hereby certify that I am NOT married.

Signature of Plan Annuitant

Date

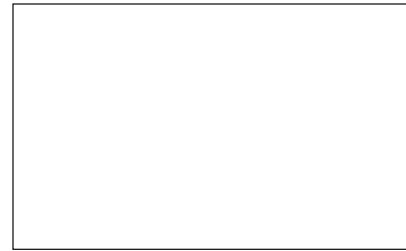
2. I am the current spouse of the above-named Annuitant. By affixing my signature below, I hereby consent to this request for a direct rollover. I further acknowledge and fully understand the consequences of this consent. I acknowledge and understand that I have the right to receive a benefit from the Contract identified in Section 1 which was purchased under a Section 403(b) arrangement, and that I hereby waive such right with respect to the amount being directly rolled over from the Contract.

Signature of Plan Annuitant's Spouse

Print Name of Annuitant's Spouse

Notary Public/Plan Administrator (Needs to be completed)

State of _____, County of _____.
On the _____ day of _____ year before me personally appeared _____ to me known to be the person described in and who executed the foregoing instrument, and acknowledged that (s)he executed the same.



Notary Public – Stamp Here

Title & Signature of Notary Public or Plan Administrator

5B. Employer/Plan Administrator's Acknowledgement

For Direct Plan-to-Plan Transfers and Direct Rollovers only:
(Signed by Former Employer/Plan Administrator/other authorized person)

I am the former Employer/Plan Administrator/other authorized person of the individual identified in Section 1 and acknowledge that this transaction is approved under the Employer's 403(b) plan.

Signature of Former Employer/Plan Administrator/other authorized person Date

Print Name of Former Employer/Plan Administrator/other authorized person Print Title

Separation from Service Date: ___/___/___ Vesting %: _____

For all transactions other than a direct rollover to an IRA:
(Signed by Current Employer/Plan Administrator/other authorized person)

If this is a 403(b) contract exchange under the plan of an Employer, no specific Employer signature is required if the Employer has given Equitable documentation as to approved providers, and the transferee provider is included in such documentation.

I am the current Employer/Plan Administrator/other authorized person of the individual identified in Section 1 and acknowledge that this transaction is permitted under the Employer's plan and that I approve of this transaction.

If this is a 403(b) contract exchange under the same plan, I further acknowledge that the Employer and the issuer of the transferee's 403(b) contract or 403(b)(7) custodial account agree to enter into an information sharing agreement before January 1, 2009 within the meaning of Treas. Reg. Sec. 403(b)-10.

Signature of Current Employer/Plan Administrator/other authorized person Date

Print Name of Current Employer/Plan Administrator/other authorized person Print Title