



EQUITABLE BULLETIN

Life Business

- ☒ New
- ☐ Update

Category

- ☐ Products
- ☐ Underwriting
- ☐ New Business
- ☐ Marketing
- ☐ Compliance/Legal
- ☒ Miscellaneous

Channel: Independent

Bulletin number: AD21-0412 (April 26, 2021)

Subject: We are excited to offer eDelivery

Who: Financial Professionals

What: Beyond offering a digital experience many clients have come to expect, the electronic policy delivery process offers many benefits.

Speed and convenience

- eDelivery uses industry standard eSign technology.
- eDelivery simplifies the policy delivery experience, eliminating the need to hand deliver, wet sign and send policy delivery requirements to the National Operations Center.

Efficiency

- eSigned delivery requirements are automatically routed to Equitable's Life Operations Center.
- Policyowner can enroll in Equitable Online Account Access once they've completed the electronic delivery process. This allows them to do financial and service transactions online.
- Copies of the policy and signed delivery requirements are always accessible on the primary Financial Professional's dashboard which can be accessed through Equitable Distributors > Quick Links > ePolicy Dashboard.

How:

You can elect eDelivery when taking an application through the Equitable Life e-App platform when it becomes available. When submitting a paper application, complete the electronic policy delivery authorization form and submit with the application. eDelivery is currently not available for the following products and programs:

- Guaranteed Issue
- COIL Institutional SeriesSM
- International Underwriting Program

When: April 26, 2021

Why: To provide an end-to-end digital experience to Financial Professionals and clients

How: See the [Resource Guide](#) and [FAQ](#) for more information.

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 07310 and are distributed by Equitable Distributors, LLC.

Equitable is the brand name of the retirement and protection subsidiaries of Equitable Holdings, Inc., including Equitable Financial Life Insurance Company (NY, NY), Equitable Financial Life Insurance Company of America, an AZ stock company with main administrative headquarters in Jersey City, NJ, and Equitable Distributors, LLC. Equitable Advisors is the brand name of Equitable Advisors, LLC (member FINRA, SIPC) (Equitable Financial Advisors in MI and TN).

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