



# 2021 year-end processing deadlines

What you need to know

## Guidelines

**As we continue to move through the fourth quarter and near the end of the business year, we want to let you know about application processing for year-end.**

Although there is no official deadline to submit formal applications, the following guidelines will help ensure cases are processed in a timely manner, policies are delivered to customers for 2021 and producers receive their compensation payments within appropriate timelines.

As always, we thank you for your business.

## Important dates

Category	Date	Guideline
Year-end deadline	Before Friday, December 3	Cases must be complete, in good order and submitted to expedite underwriting, issue, and delivery by year-end. e-App submissions are always encouraged and are a requirement for Easy Underwriting. Paper applications may result in longer processing times.
2021 reportable income Year-end commissions	Friday, December 17	Premiums must be received, processed and paid by this date to count for 2021 reportable income. All outstanding delivery requirements must be submitted and received in good order by this date for year-end commissions to be paid.
Post-issue requirements	Friday, December 17, 4PM EST	Post-issue delivery requirements must be received by this time. (See chart below for details.)
Commission checks	December 31, 2021	Date of year-end commission checks.

## 4 ways to submit post-issue requirements

Mail	Fax	Email	Online
Equitable 8501 IBM Drive Suite 150 Charlotte, NC 28262	(855) 277-6121	PostIssueDeliveryReq@equitable.com	Uploaded through the Equitable Distributors Portal. Log in at <a href="http://www.equitable.com">www.equitable.com</a>

**Please contact the Life Insurance Sales Desk at  
(800) 924-6669, option 2 with any questions.**

**[EquitableLIFT.com](https://www.EquitableLIFT.com)**

Equitable is the brand name of Equitable Holdings, Inc. and its family of companies, including Equitable Financial Life Insurance Company (Equitable Financial) (NY, NY); Equitable Financial Life Insurance Company of America (Equitable America), an AZ stock company with main administrative headquarters in Jersey City, NJ; Equitable Advisors, LLC (member FINRA, SIPC); and Equitable Distributors, LLC. The obligations of Equitable Financial and Equitable America are backed solely by their claims-paying abilities.

For Financial Professional Use Only. Not for distribution to the general public.

© 2021 Equitable Holdings, Inc. All rights reserved.



**EQUITABLE**