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## EQUITABLE LIFE & CASUALTY (EQL)

### Agent Contracting Instructions

- 1) Send an email to [Contracting@MrAnnuity.com](mailto:Contracting@MrAnnuity.com) requesting to be contracted with Equitable Life.
- 2) You will then receive an email with instructions on what to do next.
- 3) When you have completed the licensing process, you will be assigned an agent number.
- 4) After you obtain your agent number, you will receive instructions on how to complete Product Specific Training, which you must do before submitting an annuity application.

#### Equitable Product Training

- a) Log on to Equitable website. <https://www.equiline.com/>
- b) Go to "My Account". Scroll down to Equitable Secure Savings Training.
- c) Click on Secure Savings Training and watch slideshow. Takes about 7 minutes.
- d) Check the box that says "Yes" to certify completion of your Secure Savings product Training.

No certificate will be available to print.

#### Be prepared to provide copies of the following documents:

- Current copy of your **Group 1 Texas Insurance License**.
- Proof that your **Anti-Money Laundering Training** is current.
- A copy of current **E&O Certificate of Insurance**.
- Provide proof that you have completed the **4 hour Annuity Certification Training Course (Texas)**.

If you have NOT completed this course, you **must** do so **BEFORE** submitting an Annuity Application. You may complete the course at [www.WebCE.com](http://www.WebCE.com) or [www.SuccessCE.com](http://www.SuccessCE.com).

As of 09/01/2011, 8 hours of annuity specific training must be completed during the agent's 2-year Group 1 licensing period. If you have completed this additional training, please provide proof of completion. If you are exempt from the additional training, please provide a copy of the exemption letter you received from the Texas Department of Insurance.

Send all annuity applications directly to Equitable Life.

Call us if you have any questions.

Thank you!



Sales & Service Forms are available on our website: [www.MrAnnuity.com](http://www.MrAnnuity.com)