

DANNY FISHER, CLU, ChFC
President

Danny@MrAnnuity.com
www.MrAnnuity.com

13140 Coit Road, Suite 102
Dallas, TX 75240-5797
972-238-1450
800-822-1450
Fax: 972-680-0562

EQUITABLE LIFE & CASUALTY (EQL)

Agent Contracting Instructions

- 1) Send an email to 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.

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 **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 or 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