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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.

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**.
- A copy of current **E&O Certificate of Insurance**.
- Proof that your **Anti-Money Laundering Training** is current. (Certificate from: other insurance company AML Training courses, WebCE, SuccessCE, QuestCE, 360Training, etc.)
- Proof that you have completed the once in a lifetime **4 hour Annuity Certification Training Course (Texas)**. Also known as the "NAIC Suitability Training Certificate"

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, etc.

- Proof that you are current on **Continuing Education Requirements** for Annuities

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.

"Grandfathered" agents are **EXEMPT** from additional annuity CE requirements if you have been continuously licensed for at least 20 years, with no break in licensure greater than 90 days. Most companies require that you submit proof that you are exempt via an Exemption letter from the TDI.

To request an exemption letter, fax a completed TDI Form # **LHL216** to the TDI at **512-490-1054**. The TDI Form # **LHL216** form is available on line at:

<http://www.tdi.texas.gov/forms/finagentlicense/fin517.pdf>

Send all annuity applications directly to Equitable Life.

Call us if you have any questions.

Sales & Service Forms are available on our website: www.MrAnnuity.com