



Asset Rebalancing – Equitable Guaranteed Investment Funds

- Use this form to set up, modify, or remove asset rebalancing instructions from a contract.
- Asset rebalancing lets you choose specific percentages for your funds and have the assets periodically rebalanced back to these original percentages.
- You can only provide rebalancing instructions for funds that share the same sales charge option.
- Please be aware that for non-registered contracts, asset rebalancing may lead to capital gains or losses on the units transferred. As a result, this will be treated as a capital disposition for tax purposes.

Owner(s) name(s): _____ Contract number: _____

How often would you like your contract rebalanced?

☐ Quarterly ☐ Semi-annually (twice a year) ☐ Annually

Start date (yyyy/mm/dd): _____

Choose the rebalancing percentages for each fund:

Fund code	Fund name	Rebalance %
		Total must equal 100%

Where the fund code and the fund name do not match, the fund code will be used.

OR

☐ Please cancel my current asset rebalancing instructions.

Signatures

I/we authorize Equitable to process the asset rebalancing instructions provided above. I/we understand that Equitable will not provide advice regarding rebalancing and will process my scheduled rebalance regardless of market conditions and fund values. I/we understand that asset rebalancing may lead to capital gains or losses on the fund units transferred.	
Date (yyyy/mm/dd):	Owner signature:
Date (yyyy/mm/dd):	Joint owner signature (if applicable):
Date (yyyy/mm/dd):	Irrevocable beneficiary signature (if applicable):
Date (yyyy/mm/dd):	Advisor signature (with limited trading authorization):

Please note: Equitable cannot ensure the privacy and confidentiality of any information sent through the internet because e-mail may be vulnerable to interception. As a result, Equitable is not responsible for any loss or damages you may incur if your information is intercepted and misused. If you would prefer to submit your information by another means, please contact us at 1-800-668-4095.