

REALLOCATION AND TRANSFER OF FUNDS - UNIVERSAL LIFE



Complete the appropriate section for your applicable product type.

EQUITABLE GENERATIONS

Monthly Charges

- Deduct monthly charges pro rata from the Investment Interest Accounts selected for my Deposit Allocation.
- Deduct monthly charges as indicated under Charges Allocation (below), from the Accounts specified for Deposit Allocation.
- No change to existing monthly Charges Allocation.

Deposit Investment Account

% _____ to Daily Interest Account
 % _____ to Guaranteed Deposit Account for a term
 of 1 Year 5 year 10 year

Shuttle Account

% _____
 % _____

Index Options

% _____ to American Equity Index	% _____
% _____ to Canadian Equity Index	% _____
% _____ to U.S. Technologies Index	% _____

ESG Index Options

% _____ to American Equity Index (ESG)	% _____
% _____ to Canadian Equity Index (ESG)	% _____
% _____ to European Equity Index (ESG)	% _____

Managed Fund Options

Fixed Income

% _____ to Canadian Bond	% _____
% _____ to Global Fixed Income	% _____

Domestic Equities

% _____ to Canadian Equity	% _____
% _____ to Special Situations	% _____
% _____ to Large Cap Canadian Equity	% _____

Foreign Equities

% _____ to American Equity	% _____
% _____ to American Growth Equity	% _____
% _____ to Global Equity	% _____
% _____ to Global Innovators Equity	% _____
% _____ to International Equity	% _____

Balanced

% _____ to Global Equity Balanced	% _____
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Sustainable Investment Options

% _____ to Sustainable Balanced	% _____
% _____ to Sustainable Bond	% _____
% _____ to Sustainable Equity	% _____

Portfolio Options

% _____ to Balanced Growth Portfolio	% _____
% _____ to Balanced Income Portfolio	% _____
% _____ to Canadian Balanced Portfolio	% _____
% _____ to Canadian Neutral Portfolio	% _____
% _____ to Diversified Equity Portfolio	% _____
% _____ to Diversified Income Portfolio	% _____
% _____ to Global Equity Portfolio	% _____
% _____ to Growth Portfolio	% _____

Target Date Options

% _____ Target Date 2035	% _____
% _____ Target Date 2040	% _____
% _____ Target Date 2045	% _____
% _____ Target Date 2050	% _____
% _____ Target Date 2055	% _____
% _____ Target Date 2060	% _____



EQUILIFE

(Shuttle account restricted to Daily Interest Account for policy applications received after October 7, 2016)

Monthly Charges

- Deduct monthly charges pro rata from the Investment Interest Accounts selected for my Deposit Allocation.
- Deduct monthly charges as indicated under Charges Allocation (below), from the Accounts specified for Deposit Allocation.
- No change to existing monthly Charges Allocation.

Deposit Allocation

% _____ to Daily Interest Account
 % _____ to Guaranteed Deposit Account for a term
 of 1 Year 5 year 10 year

Shuttle Account

% _____
 % _____

Index Interest Options

% _____ to American Equity % _____
 % _____ to European % _____
 % _____ to U.S. Technologies % _____
 % _____ to U.S. Blue Chip % _____
 % _____ to Canadian Equity % _____

Performance Fund Interest Options

% _____ to Global % _____
 % _____ to Canadian % _____
 % _____ to Canadian Bond % _____
 % _____ to Canadian Value Stock % _____
 % _____ to Large Cap Canadian Equity % _____
 % _____ to Global Fixed Income % _____
 % _____ to Global Balanced % _____

Portfolio Interest Options

% _____ to Diversified Income % _____
 % _____ to Balanced Income % _____
 % _____ to Balanced Growth % _____
 % _____ to Growth Portfolio % _____
 % _____ to Diversified Equity % _____



EQUATION GENERATION IV

(Shuttle account restricted to Daily Interest Account for policy applications received after October 7, 2016)

Monthly Charges

- Deduct monthly charges pro rata from the Investment Interest Accounts selected for my Deposit Allocation.
- Deduct monthly charges as indicated under Charges Allocation (below), from the Accounts specified for Deposit Allocation.
- No change to existing monthly Charges Allocation.

Deposit Allocation

% _____ to Daily Interest Account
 % _____ to Guaranteed Deposit Account for a term
 of 1 Year 5 year 10 year

Shuttle Account

% _____
 % _____

Index Interest Options

% _____ to American Equity	% _____
% _____ to European	% _____
% _____ to U.S. Technologies	% _____
% _____ to U.S. Blue Chip	% _____
% _____ to Canadian Equity	% _____

Performance Fund Interest Options

% _____ to Global	% _____
% _____ to Canadian	% _____
% _____ to Canadian Bond	% _____
% _____ to Canadian Value Stock	% _____
% _____ to Large Cap Canadian Equity	% _____
% _____ to Global Fixed Income	% _____
% _____ to Global Balanced	% _____

Portfolio Interest Options

% _____ to Diversified Income	% _____
% _____ to Balanced Income	% _____
% _____ to Balanced Growth	% _____
% _____ to Growth Portfolio	% _____
% _____ to Diversified Equity	% _____



EQUATION GENERATION III

(Shuttle account restricted to Daily Interest Account for policy applications received after October 7, 2016)

Monthly Charges

- Deduct monthly charges pro rata from the Investment Interest Accounts selected for my Deposit Allocation.
- Deduct monthly charges as indicated under Charges Allocation (below), from the Accounts specified for Deposit Allocation.
- No change to existing monthly Charges Allocation.

Deposit Allocation

% _____ to Daily Interest Account
 % _____ to Guaranteed Deposit Account for a term
 of 1 Year 5 year 10 year

Shuttle Account

% _____
 % _____

Index Interest Options

% _____ to American Equity % _____
 % _____ to European % _____
 % _____ to U.S. Technologies % _____
 % _____ to U.S. Blue Chip % _____
 % _____ to Canadian Equity % _____

Performance Fund Interest Options

% _____ to Global % _____
 % _____ to Canadian % _____
 % _____ to Canadian Bond % _____
 % _____ to Canadian Value Stock % _____
 % _____ to Large Cap Canadian Equity % _____
 % _____ to Global Fixed Income % _____
 % _____ to Global Balanced % _____

Portfolio Interest Options

% _____ to Diversified Income % _____
 % _____ to Balanced Income % _____
 % _____ to Balanced Growth % _____
 % _____ to Growth Portfolio % _____
 % _____ to Diversified Equity % _____



EQUATION GENERATION II

Monthly Charges

- Deduct monthly charges pro rata from the Investment Interest Accounts selected for my Deposit Allocation.
- Deduct monthly charges as indicated under Charges Allocation (below), from the Accounts specified for Deposit Allocation.
- No change to existing monthly Charges Allocation.

Deposit Allocation

% _____ to Daily Interest Account
% _____ to Guaranteed Deposit Account for a term
of 1 Year 5 year 10 year

Shuttle Account

% _____
% _____

Index Interest Options

% _____ to American Equity	% _____
% _____ to European	% _____
% _____ to U.S. Technologies	% _____
% _____ to U.S. Blue Chip	% _____
% _____ to Canadian Equity	% _____

Performance Fund Interest Options

% _____ to Global	% _____
% _____ to Canadian	% _____



EQUATION

Deposit Allocation

The percentage total must equal 100%

- % _____ to Daily Interest Account
- % _____ to Guaranteed Deposit Account for a Term of 1 Year 2 year 3 year 4 year 5 year
- % _____ to Equitable Money Market
- % _____ to Equitable Bond
- % _____ to Equitable MFS Balanced
- % _____ to Equitable MFS Canadian Equity Plus

Index Interest Options

- % _____ to Canadian Equity
- % _____ to American Equity
- % _____ to U.S. Technologies
- % _____ to European

Performance Fund Interest Options

- % _____ to Global
- % _____ to Domestic

Tax Exempt Options

- Change my tax exempt transfer account to _____ (Equitable Money Market is default, if no fund specified).
- When tax exempt room becomes available, automatically transfer from my non-exempt fund to _____ exempt account. (Daily Interest Account is default, if no account specified).

Automatic Investment Options

- When sufficient funds accumulate in the Daily Interest Account, they will automatically be transferred to a Guaranteed Deposit Account for 1 Year 2 year 3 year 4 year 5 year. The transfer will occur at the earlier of the next policy anniversary or at the next premium payment.
- At the end of the term of a Guaranteed Deposit Account I request the following:
 - automatically reinvest in a new Guaranteed Deposit Account for the same term OR
 - automatically invest in a new Guaranteed Deposit Account for 1 Year 2 year 3 year 4 year 5 year
 - OR
 - automatically invest in the Daily Interest Account



DIRECTION 2000 PLUS

Deposit Allocation

The percentage total must equal 100%

- % _____ to Daily Interest Account
- % _____ to Guaranteed Deposit Account for a Term of 1 Year 2 Year 3 Year 4 Year 5 year
- % _____ to Equitable Money Market
- % _____ to Equitable Bond
- % _____ to Equitable MFS Balanced
- % _____ to Equitable MFS Canadian Equity Plus

Index Interest Options

- % _____ to Canadian Equity
- % _____ to American Equity
- % _____ to U.S. Technologies
- % _____ to European

Performance Fund Interest Options

- % _____ to Global
- % _____ to Domestic

Tax Exempt Options

- Change my tax exempt transfer account to _____ (Equitable Money Market is default, if no fund specified).
- When tax exempt room becomes available, automatically transfer from my non-exempt fund to _____ exempt account. (Daily Interest Account is default, if no account specified).

Automatic Investment Options

- When sufficient funds accumulate in the Daily Interest Account, they will automatically be transferred to a Guaranteed Deposit Account for 1 Year 2 Year 3 Year 4 Year 5 year. The transfer will occur at the earlier of the next policy anniversary or at the next premium payment.
- At the end of the term of a Guaranteed Deposit Account I request the following:
 - automatically reinvest in a new Guaranteed Deposit Account for the same term OR
 - automatically invest in a new Guaranteed Deposit Account for 1 Year 2 Year 3 Year 4 Year 5 year
 - OR
 - automatically invest in the Daily Interest Account



DIRECTION 2000

Deposit Allocation The percentage total must equal 100%

% _____ to Daily Interest Account

% _____ to Guaranteed Deposit Account for a Term Annual Monthly
of 1 Year 2 Year 3 Year 4 Year 5 year 10 year

% _____ to Equitable MFS Canadian Fixed Income

% _____ to Equitable MFS Common Stock

4. AGREEMENT

All deposit allocations, transfers, or automatic investment options are subject to the minimums stated in your policy contract. Deposit allocations and automatic investment options selected will remain in effect until receipt by The Equitable life Insurance Company of Canada of a written request for change from the Policy owner.

I acknowledge that there may be market value adjustments and surrender charges as per the terms of my contract in respect of the amounts transferred.

Name of Policy owner/Signing Officer 1 _____

Signature of Policy owner/Signing Officer 1 _____ Date _____
mm/dd/yyyy

Name of Policy owner/Signing Officer 2 _____

Signature of Policy owner/Signing Officer 2 _____ Date _____
mm/dd/yyyy