

# AXA Equitable's Website for 403(b) Plan Sponsors

Employer Plan Administration Center for EQUI-VEST®

***The Employer Plan Administration Center for EQUI-VEST® is an online management tool to help employers simplify and streamline the work associated with administering their 403(b) plans. Employers who have a plan with active participants can use the Center to review, monitor, and transmit plan information.***

## The Center Is Your Entry Point

- View plan and EQUI-VEST® account balance information.
- View participant lists and plan participants' information.
- Upload contribution files with EQUI-VEST® contribution data.

## As Plan Regulations Change, So Does the Center

Enhancements will be rolled out for the Center in the fourth quarter of 2008. Through these enhancements, you and/or your third-party administrator will be able to tap into the Center to:

- Assist with the tracking of deferral limits by viewing employees' year-to-date and total contributions to their EQUI-VEST® accounts.
- View employees' year-to-date and total rollovers to their EQUI-VEST® accounts.
- Access/share employee data needed to evaluate loan and/or hardship withdrawal requests.
- View your plan information, including your list of approved providers, their contact information, and whether they're approved for contributions and/or transfers/exchanges.

## Current and Secure Information

Account information is generally updated after the close of every AXA Equitable business day.\* In addition, the Center incorporates several security features to ensure the privacy and security of plan information, including:

- A "three strikes" feature that automatically deactivates your account access after three invalid login attempts.
- Built-in timers that terminate your online session after 30 minutes of inactivity.
- Bookmark protection that always requires a login process, even if someone attempts to go to a page in the Center that may have been bookmarked.

## Registration Required

You must register with the EQUI-VEST® Service Center to access the Center. To get started, call Technical Support at (800) 628-6673 or email [EV.Collections@axa-equitable.com](mailto:EV.Collections@axa-equitable.com).

You will need to provide your AXA Equitable unit number, your organization's name, and the name and telephone number of the person who will be your Employer Plan Administration Center for EQUI-VEST® contact. It takes up to three business days to process your registration and furnish you with the Center username and password.

As the plan sponsor, you decide which of your staff members will have access to the Center. You can also authorize a third-party administrator that provides you with plan services to receive access. For security reasons, each plan sponsor is assigned only one username and password. We recommend you limit the number of staff members to whom you allow access to this website.

\* The term "AXA Equitable business day" means, generally, any day on which AXA Equitable is open and the New York Stock Exchange is open for trading. Additionally, we may choose to close on the day immediately preceding or following a national business holiday, or due to emergency conditions. For purposes of determining the transaction date, AXA Equitable's business day ends at 4:00 p.m., Eastern Time.



## View the Demo

To see how the Center works, try out our demo.

- Go to [www.axa-equitable.com](http://www.axa-equitable.com).
- Click on **Login Options** for Employer Plan Administration.
- Click on **Demo**.

### 403(b) Plan Level Information

After you click on “Login” to the demo, the Plan Information screen will appear.

Plan Administrator Approval Required	Yes	No
Transfer(s) Among Investment Options		✓
Change to Investment Allocations for Future Contributions		✓
Plan Loans to Participants		✓
Partial Withdrawal from Participant's Account(s)	✓	
Total Withdrawal of Participant's Account(s)	✓	

### Employee 403(b) Account Details

Click on **Balances** in the menu bar to view plan balances:

- By investment options (all sources)
- By source (all investments)

Investment Option	Units	Unit Value	Amount	Percent
EQ/Alliance Bernstein Com Stck	7.782 0405	194.981789	\$1,517,356.18	4.54%
EQ/Money Market Portfolio	5.0746	129.170873	\$655.49	0.00%
Guaranteed Interest Account			\$6,359,415.76	19.02%
EQ/Alliance Bernstein Int'l Gr/Sec	1.0063	145.850518	\$146.77	0.00%
EQ/Evergreen Internat'l Bond	139.4361	100.715442	\$14,043.37	0.04%
EQ/Legg Mason Value Equity	63.7671	118.236241	\$7,539.58	0.02%
EQ/Alliance Bernstein Gr & Inc	3.985 4008	266.774752	\$1,063,204.31	3.18%
EQ/Alliance Bernstein Qual Bnd	5.4857	155.487751	\$852.96	0.00%
EQ/Equity 500 Index	5.375 5673	199.601692	\$1,072,972.33	3.21%
EQ/Alliance Bernstein Intl	4.234 8683	174.415969	\$738,628.23	2.21%
EQ/Alliance Bernstein Sm Cp Gr	936.8150	202.595249	\$189,591.67	0.57%
EQ/JP Morgan Val Opportunities	801.0263	138.839021	\$111,213.71	0.33%
EQ/Mercury International Value	2,613.1879	167.065010	\$436,572.26	1.31%
EQ/Capital Guardian Growth	148.8030	80.652701	\$12,001.36	0.04%
EQ/MFS Emerging Growth Cos.	441.9686	110.584170	\$48,874.73	0.15%
EQ/Van Kampen Emerging Mkts Eq	16,307.9298	316.000285	\$5,153,310.46	15.41%
EQ/FI Mid Cap Value	4,307.2065	156.600778	\$674,511.89	2.02%
EQ/Mercury Basic Value Equity	579.8180	203.335659	\$117,997.79	0.35%
EQ/Alliance Bernstein Lg Cp Gr	7,706.9861	73.503716	\$566,492.12	1.69%
EQ/Evergreen Omega	19.1822	95.133395	\$1,824.87	0.01%
EQ/MFS Investors Trust	32.7527	110.493232	\$3,618.95	0.01%
EQ/Capital Guardian Research	12.0472	139.108524	\$1,675.87	0.01%
EQ/Capital Guardian U.S. Eqty	104.9608	132.654514	\$13,923.52	0.04%

## Participant Records

Click on Participants in the menu bar to search for or view participant records.

- Search for participant records—individually or as a group; by name or by status.

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Plan Info Balances **Participants** Upload Contribution File Service Logout

### Employer Plan Administration Center for EQUI-VEST®

PARTICIPANT SEARCH Today's Date: 1/4/2008  
 Client Name: Sample Public School Contract ID: 12345678

Participant Information As Of Date: 1/3/2008  
 Use as many fields and check boxes as desired. Clicking on the Search button without using any fields or check boxes will create a list of all participants sorted alphabetically by name.

Show Participants With Status:  All Participants  Active  Paid Out

Search For A Plan Participant:  
 Last Name:   
 First Name:   
 SS Number: (no dashes)

Sort Results By:  Name  SS Number  Status

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If you have business questions about the information you are viewing or information that is presented herein, or password related issues, please call EQUI-VEST® Customer Service at 1-800-628-6673, press 2 and ask for Technical Support, or email us at [EV\\_Collections@Axa-equitable.com](mailto:EV_Collections@Axa-equitable.com). Our customer service representatives are available on each business day Monday through Thursday from 8:00 A.M. to 7:00 P.M., and on Fridays until 5:00 P.M. Eastern Time.

If you require technical support, please call our help desk at 1-877-222-2144 which is available 8 a.m. to 6 p.m. ET Monday through Friday.

The EQUI-VEST® variable annuity is issued by AXA Equitable Life Insurance Company (NY, NY). EQUI-VEST® is distributed by an affiliate, AXA Advisors, LLC (Member [SIPC](#)). Guarantees are based on the claims paying ability of AXA Equitable.

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- Review information at the participant level.

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### Employer Plan Administration Center for EQUI-VEST®

ACCOUNT DETAILS  
 Today's Date: 1/4/2008  
 Certificate or Contract #: 12345678 Type of Plan: EQUI-VEST TSA

Plan Name: Sample Public School Plan ID: 001  
 Annuitant: Joan Teacher Location Code: 002  
 Owner: Joan Teacher Participation Date: 9/4/1996

Last Contribution Amount: \$770.00  
 Last Contribution Date: 12/28/2007  
 Total Contributions Since Inception: \$82,630.00

Client: Sample Public School Address: 1 Main Street Anytown, USA 12345  
 Your Financial Professional: Jane Smith Financial Professional's Phone Number: (212) 555-1212

Investment Options As Of: 1/3/2008 [View Additional Unit Values](#)

Investment Options	Units	Unit Values	Account Value	Contribution Allocations
Guaranteed Interest Account			\$35,694.10	40%
EQ/Alliance Bernstein Gr & Inc	50.4852	266.774752	\$13,469.18	0%
AXA/Moderate Allocation Port	399.4221	167.887614	\$75,046.47	60%
<b>Total Account Value: \$124,208.75</b>				

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If you require technical support, please call our help desk at 1-877-222-2144 which is available 8 a.m. to 6 p.m. ET Monday through Friday.

## Upload Contribution File

The upload contribution feature allows you to transmit EQUI-VEST® contribution data to AXA Equitable.

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### Employer Plan Administration Center for EQUI-VEST®

Client Name: Sample Public School Today's Date: 1/4/2008  
 Unit ID: 12345678

Contribution File Upload

Your Name:   
 Your Phone:   
 Your E-Mail:   
 Total Files To Be Attached:

Attach and Submit one file at a time  
 File:

Total Dollars this File: \$   No Commas  
 Tax Year:

Contribution Method: None   
 Comments:

Please include the check deposit form with all checks. Make your check payable to "AXA Equitable" and, if you are using regular mail, send it to our Automated Lock Box at: EQUI-VEST Unit Annuity Lockbox, P.O. Box 13463, Newark, NJ 07188-0463. If you wish to overnight your check, send it to: JPMorgan Chase, 4 Chase Metrotech Center, NY Remit One Image Lockbox #13463, 7th Floor, Brooklyn, NY 11245-0001, Attn: Extraction Supervisor, (718) 242-2992.

Plan Info Balances Participants **Upload Contribution File** Service Logout

## For More Information

If you have business questions about the information on the Center or password-related issues, please call the EQUI-VEST® Service Center at (800) 628-6673.

Your AXA Advisors financial professional is also available to provide you with information and support to help you administer your 403(b) plan.

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Visit our website at: [www.axa-equitable.com](http://www.axa-equitable.com)



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