



# MONY/MLOA

## One-Time Transfer, Change of Allocations, Asset Rebalancing

Variable Annuity FPVA (1VAA / 2VAA)

### Return:

MONY Life Insurance Company  
of America (MLOA)  
Not Licensed in New York

MONY Life Insurance Company (MONY)

### Express Mail:

100 Madison Street  
Syracuse, NY 13202

### Regular Mail:

PO Box 4720  
MD 32-10  
Syracuse, NY 13221  
Toll Free # 1-800-487-6669

### Fax Number:

(866) 505-0260

### For Assistance:

#### Call:

(800) 487-6669  
Monday-Friday  
8:00 a.m. - 5:00 p.m. EST

### To Sign Up For eDelivery:

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

### 1. Type of Request

Please complete the sections listed below if you are requesting a:

- One Time Transfer of Current Contract Fund Value — sections 2, 3, 6
- Enclosed Payment Allocation — sections 2, 5A, 6
- Change Future Payment Allocation — sections 2, 5B, 6
- One Time Total Reallocation — sections 2, 5C, 6
- Auto Rebalancing — sections 2, 5D, 6

Please read the guidelines in section 4 and general information page prior to completing this form.

### 2. Owner's Information (Please Print)

Please check if this is an address change.

Contract Number:

Owner's Name: \_\_\_\_\_  
Last, First, Middle

Owner's Daytime Phone Number:    -    -

Joint Owner's Name: \_\_\_\_\_  
Last, First, Middle (if applicable)

Joint Owner's Daytime Phone Number:    -    -

Owner's Email Address: \_\_\_\_\_

Annuitant's Name (if other than Owner): \_\_\_\_\_  
Last, First, Middle

Address: \_\_\_\_\_  
Number and Street Apt./Suite/Floor

City

State

Zip

**3. One-Time Transfer of Current Contract Fund Value** - see pages 4&5 for a complete listing of funds

**(Please refer to your contract or prospectus for transfer restrictions that may apply.)**

- Whole percentages must be indicated
- Allocation to any account must be no less than 5% and must total 100%
- Transfer requests for or above \$250,000 per day, per owner must be requested in writing via U.S. Mail
- A one-time transfer of current contract fund value does not affect future contributions
- Separate forms are required for each contract
- All alterations must be initialed and dated
- Please refer to back page for additional conditions and restrictions

Transfer From: \_\_\_\_\_  100% or \_\_\_\_\_ % or \$ \_\_\_\_\_

Fund Name                      % or \$                      Fund Name                      % or \$

To: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Transfer From: \_\_\_\_\_  100% or \_\_\_\_\_ % or \$ \_\_\_\_\_

Fund Name                      % or \$                      Fund Name                      % or \$

To: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Transfer From: \_\_\_\_\_  100% or \_\_\_\_\_ % or \$ \_\_\_\_\_

Fund Name                      % or \$                      Fund Name                      % or \$

To: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Transfer From: \_\_\_\_\_  100% or \_\_\_\_\_ % or \$ \_\_\_\_\_

Fund Name                      % or \$                      Fund Name                      % or \$

To: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**3. One-Time Transfer (continued)**

Transfer From: \_\_\_\_\_  100% or \_\_\_\_\_ % or \$ \_\_\_\_\_

<u>Fund Name</u>	<u>% or \$</u>	<u>Fund Name</u>	<u>% or \$</u>
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To: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Transfer From: \_\_\_\_\_  100% or \_\_\_\_\_ % or \$ \_\_\_\_\_

<u>Fund Name</u>	<u>% or \$</u>	<u>Fund Name</u>	<u>% or \$</u>
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To: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**4. Guidelines for Completing Section 5**

**A. Enclosed Payment Allocation**

- Whole Percentages must be indicated
- Allocation to any account must be no less than 5% and must total 100%
- Separate forms are required for each contract
- All alterations must be initialed and dated by the owner

**B. Change Future Payment Allocation**

- Whole Percentages must be indicated
- Allocation to any account must be no less than 5% and must total 100%
- Separate forms are required for each contract
- All alterations must be initialed and dated by the owner

**C. One Time Total Reallocation**

- Whole Percentages must be indicated
- Allocation to any account must be no less than 5% and must total 100%
- Dollar Cost Averaging and Auto Rebalancing cannot be in effect simultaneously
- All alterations must be initialed and dated by the owner
- Please refer to the back page for additional conditions and restrictions

**D. Auto Rebalancing**

- Fund values in the Guaranteed Interest Account are not available for this program
- Whole Percentages must be indicated
- Allocation to any account must be no less than 5% and must total 100%
- All alterations must be initialed and dated by the owner
- Future payment allocations must match auto rebalancing allocations
- Transfers will take place the first business day following the end of each rebalancing period. These periods are measured from the contract date. This date will be known as the reallocation date. The reallocation date will not necessarily correspond to a quarterly, semi-annual, or annual calendar date
- Please refer to the back page for additional conditions and restrictions

**5. Enclosed Payment Allocation / Change Future Payment Allocation / One Time Total Reallocation / Auto Rebalancing**

**Auto Rebalancing Only -**

Select:  Initiate Auto Rebalancing program OR  Change existing Auto Rebalancing program

Select desired frequency:  Quarterly  Semiannual  Annual

MONEY ANNUITY PRODUCTS FUND CLASS / FUND NAME	1VAA 2VAA	1VA 2VA	1VAC 2VAC 2VAL	A - Enclosed Payment Allocation	B - Future Payment Allocation	C - One Time Total Reallocation	D - Auto Rebalancing
<b>ASSET ALLOCATION</b>							
All Asset Allocation	✓	✓	✓	%	%	%	%
AXA Aggressive Allocation	✓	✓	✓	%	%	%	%
AXA Conservative Allocation	✓	✓	✓	%	%	%	%
AXA Conservative-Plus Allocation	✓	✓	✓	%	%	%	%
AXA Moderate Allocation	✓	✓	✓	%	%	%	%
AXA Moderate-Plus Allocation	✓	✓	✓	%	%	%	%
Franklin Income Securities	✓	✓	✓	%	%	%	%
Janus Aspen Series Balanced	N/A	✓	N/A	%	%	%	%
<b>BONDS</b>							
EQ/Core Bond Index	✓	✓	✓	%	%	%	%
EQ/Intermediate Government Bond Index	✓	✓	✓	%	%	%	%
EQ/PIMCO Ultra Short Bond	✓	✓	✓	%	%	%	%
EQ/Quality Bond Plus	N/A	✓	N/A	%	%	%	%
Multimanager Multi-Sector Bond	✓	N/A	✓	%	%	%	%
PIMCO Global Bond (Unhedged)	✓	✓	✓	%	%	%	%
<b>CASH EQUIVALENTS</b>							
EQ/Money Market	✓	✓	✓	%	%	%	%
<b>GLOBAL/INTERNATIONAL</b>							
EQ/Global Multi-Sector Equity	✓	N/A	✓	%	%	%	%
EQ/MFS International Growth	N/A	✓	N/A	%	%	%	%
INVESCO V.I. Global Health Care	✓	N/A	✓	%	%	%	%
INVESCO Van Kampen V.I. Global Value Equity	✓	N/A	✓	%	%	%	%
Janus Aspen Series Overseas	✓	N/A	✓	%	%	%	%
Janus Aspen Series Worldwide	N/A	✓	N/A	%	%	%	%
Oppenheimer Global Securities	✓	✓	✓	%	%	%	%
<b>GUARANTEED/FIXED INCOME</b>							
Guaranteed Interest	N/A	N/A	N/A	%	%	%	N/A
Guaranteed Interest Account-1 Year (Only for MA,MD,OK,OR,PA,SC,TX,WA,NJ)	✓	✓	N/A	%	%	%	N/A
Guaranteed Interest -3 Year	✓	✓	N/A	%	%	%	N/A
Guaranteed Interest -5 Year	✓	✓	N/A	%	%	%	N/A
Guaranteed Interest -7 Year	✓	✓	N/A	%	%	%	N/A
Guaranteed Interest -10 Year	✓	✓	N/A	%	%	%	N/A

**5. Enclosed Payment Allocation / Change Future Payment Allocation / One Time Total Reallocation / Auto Rebalancing (Continued)**

MONEY ANNUITY PRODUCTS FUND CLASS / FUND NAME	1VAA 2VAA	1VA 2VA	1VAC 2VAC 2VAL	A - Enclosed Payment Allocation	B - Future Payment Allocation	C - One Time Total Reallocation	D - Auto Rebalancing
<b>LARGE CAP</b>							
Drefus Stock Index	N/A	✓	N/A	%	%	%	%
EQ/Black Rock Basic Value Equity	✓	✓	✓	%	%	%	%
EQ/Boston Advisors Equity Income	✓	✓	✓	%	%	%	%
EQ/Calvert Socially Responsible	✓	✓	✓	%	%	%	%
EQ/Capital Guardian Research	✓	✓	✓	%	%	%	%
EQ/Equity Growth PLUS	N/A	✓	N/A	%	%	%	%
EQ/Large Cap Value Index	✓	✓	✓	%	%	%	%
EQ/Large Cap Value PLUS	✓	N/A	✓	%	%	%	%
EQ/Montag & Caldwell Growth	✓	✓	✓	%	%	%	%
EQ/T Rowe Price Growth Stock	N/A	✓	N/A	%	%	%	%
EQ/UBS Growth and Income	✓	✓	✓	%	%	%	%
Fidelity VIP Contrafund	N/A	✓	N/A	%	%	%	%
Franklin Rising Dividends Securities	✓	✓	✓	%	%	%	%
Janus Aspen Series Forty	✓	✓	✓	%	%	%	%
Profund VP Ultrabull	✓	✓	✓	%	%	%	%
<b>MID CAP</b>							
EQ/Mid Cap Index	✓	✓	✓	%	%	%	%
EQ/Mid-Cap Value PLUS	✓	✓	✓	%	%	%	%
EQ/Morgan Stanley Mid Cap Growth	✓	✓	✓	%	%	%	%
Janus Aspen Series Enterprise	N/A	✓	✓	%	%	%	%
<b>SECTOR/SPECIALTY</b>							
EQ/GAMCO Mergers and Acquisitions	✓	✓	✓	%	%	%	%
INVESCO V.I. Dividend Growth	✓	N/A	✓	%	%	%	%
INVESCO V.I. Technology	✓	N/A	✓	%	%	%	%
MFS Utilities	✓	N/A	✓	%	%	%	%
Profund VP Bear	✓	✓	✓	%	%	%	%
Profund VP Rising Rates Opportunity	✓	✓	✓	%	%	%	%
<b>SMALL CAP</b>							
EQ/Alliance Bernstein Small Cap Growth	✓	N/A	✓	%	%	%	%
EQ/GAMCO Small Company Value	✓	✓	✓	%	%	%	%
EQ/Small Company Index	✓	N/A	✓	%	%	%	%
Multimanager Small Cap Growth	✓	✓	✓	%	%	%	%

**6. Signatures**

I (we) have read the detailed instructions provided. I (we) agree that by completing this form I (we) have not relied upon any representation or warranty from MLOA/MONY that this request will achieve a particular investment result.

I (we) further agree that I (we) will not look to MLOA/MONY to indemnify me for any investment losses I (we) may suffer as a result of this request. By signing this form, I (we) authorize and direct MLOA/MONY to process the request on my contract.

Signature: \_\_\_\_\_  
Signature of Owner (Title Required if Corporation)          
(mm/dd/yyyy)

Signature: \_\_\_\_\_  
Signature of Joint Owner\* (if applicable)          
(mm/dd/yyyy)

\* If jointly owned, all Owners must sign.

**For Registered Representative Use Only**

Type of Request  Solicited  Unsolicited

Signature: \_\_\_\_\_  
Registered Representative Signature          
(mm/dd/yyyy)

\_\_\_\_\_  
Print Registered Representative Name

Signature: \_\_\_\_\_  
Authorized Registered Principal Signature

\_\_\_\_\_  
Print Registered Principal Name

\_\_\_\_\_  
Date/Time Received by Authorized Reg Rep

If your client currently has auto-rebalancing, dollar cost averaging, or additional investment strategies, have you discussed the contract provisions with respect to these allocations as the requested transfers may have an effect on them?  Yes  No

I verify and confirm that the transfers requested are in accord with the client's investment objectives, risk tolerance, time horizon, and overall asset allocation.

When did the last sub-account transfer occur (date)? \_\_\_\_\_

**7. Special Instructions**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## General Information about Signature Requirements

- Multiple/Joint Owners: Must be signed by all Owners.
- Assignments:
  - 1) Collateral – Assignee and present Owner;
  - 2) Absolute – Assignee.
- Corporation: One officer other than the Insured on behalf of the corporation.
- Attorney-in-Fact/Guardian: Must be signed by either the Attorney-in-Fact or Guardian with their title listed. A copy of the appointment is needed if it is not already on file.
- Partnerships: Requests must be submitted in the name of the Partnership and signed by a partner other than the Insured, or two partners if Insured signs.

## General Information

### **One-Time Transfer of Current Contract Fund Value: (The Company reserves the right to impose a charge for transfers subject to contract provisions.)**

#### **Transfer FROM the Guaranteed Interest Account:**

Transfers from the Guaranteed Interest Account can be requested at any time. In some states a market value adjustment will apply unless your request is received at our administrative office within 30 days before the end of the applicable accumulation period. A minimum fund value of \$2,500.00 must be maintained in the one year guaranteed interest account in some states. Check your contract to see if these provisions apply in your state.

- Complete the section entitled “Transfer From” by indicating the investment fund and the percentage or dollar amount of the current value that is to be transferred out of the investment fund.
- Complete the section entitled “Transfer To” by indicating the investment fund(s) and the percentage or dollar amount of the fund value to be transferred into the investment fund(s).
- Any request we are unable to complete in entirety will be returned unprocessed with an explanation.
- Refer to your contract or your prospectus for additional details.

#### **Asset Re-Allocation/Re-balancing change:**

- This program includes the automatic transfers of fund values at the interval specified to maintain the desired allocation indicated in the request. These transfers involve the sales of units of subaccounts where fund values have increased and the purchase of units of subaccounts where the funds values decreased.
- Asset Rebalancing can be elected to establish a program to automatically reallocate your Contract Fund Value among the investment options either on a one-time, quarterly, semi-annual or annual basis only. Rebalancing is not available on a monthly frequency.
- The Guaranteed Interest Account is not available for Asset Rebalancing.
- Rebalancing does not assure a profit or protect against a loss in declining markets and should be periodically reviewed as your needs may change.
- The terms of this authorization will remain in effect until the contract is annuitized or surrendered, you cancel your participation in the re-balancing program in writing, or there is a change in the allocation of funds, new purchase payments or premiums.
- MONY/MLOA does not currently assess a charge for this program, but it reserves the right to assess a charge.
- MONY/MLOA reserves the right to terminate or change the terms and conditions of the program, at any time, effective 15 days from the date of written notice of such termination or change.