

① List all policies, contracts or certificates to apply

② A. Information about the annuitant/payee

NAME _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

DATE OF BIRTH (mo/day/yr) _____ ENTITY FEMALE MALE TAXPAYER ID# (Social Security#; Federal Employer ID#) _____

B. Information about the joint annuitant (if applicable)

NAME _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

DATE OF BIRTH (mo/day/yr) _____ FEMALE MALE TAXPAYER ID# (Social Security#) _____

C. For EDC and TRUSTEED annuity certificates only:

Changing the owner of the Special Payment Plan

- Check this box if the decedent's beneficiary under the plan should be substituted as the annuity death beneficiary and the "annuitant" under the Special Payment Plan.

SIGNATURE OF PLAN ADMINISTRATOR/TRUSTEE _____ DATE _____

X

③ Designate a beneficiary(ies) for this Special Payment Plan

NAME _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

DATE OF BIRTH (mo/day/yr) _____ TAXPAYER ID# (Social Security#; Federal Employer ID#) _____

RELATIONSHIP TO YOU _____

④ How much would you like to apply to the Special Payment Plan? (minimum \$2,000)

- All of the benefits All of the benefits except \$ _____

⑤ Which Special Payment Plan do you elect?

A. The Life Income Options

- SINGLE LIFE—Guaranteed income for as long as the annuitant is alive.
- JOINT AND SURVIVOR LIVES—Guaranteed income for as long as either the annuitant or the joint annuitant is alive.
- Reduced income to the survivor (optional).
The percent to the joint annuitant survivor is: 50% or 75%

B. Additional Guarantees for the Life Income Options (optional for 5A above)

- PERIOD CERTAIN—Guaranteed income with additional guarantee that payments will be made for the annuitant's lifetime (joint lifetimes for Joint and Survivor) and in no event for less than the time period you elect. Time period guaranteed: _____ years (5, 10, 15, 20 up to life expectancy).
- REFUND CERTAIN—Guaranteed income with additional guarantee that payments will be made for the annuitant's lifetime (joint lifetimes for Joint & Survivor) and in no event will the total payments made be less than the death benefit proceeds originally applied to this option.

C. Special Installment Option

- Time period selected _____ years (5 to 30 years)

D. Special Deposit Option (only available for non-qualified annuity and life insurance benefits)

- Guaranteed interest only for a fixed number of years, principal stays intact
Time period selected _____ years (2 to 5 years)

SPECIAL PAYMENT PLAN ELECTION FORM

For

Life

Insurance

& Annuity

Benefits

Please return to: AXA Equitable, National Operations Center, P.O. Box 1047, Charlotte, NC 28201-1047.

