

CLIENT WEBSITE UPLOAD A DOC USER GUIDE

My.EquiTrust.com

EquiTrust contract and policy owners have the ability to utilize Upload A Doc as an option to submit contract or policy documents and requests to EquiTrust. Documents are instantly received at EquiTrust — no mail time. With this feature, you can have confidence that your documents have been submitted securely.

- **Acceptable formats:** TIF, PDF, JPG, DOC
- **Acceptable document size:** up to 30MB
- EquiTrust does not accept electronically signed requests.
- Photo images are not accepted. Submitted forms must be scanned.

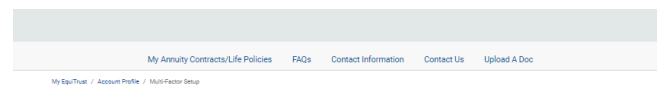
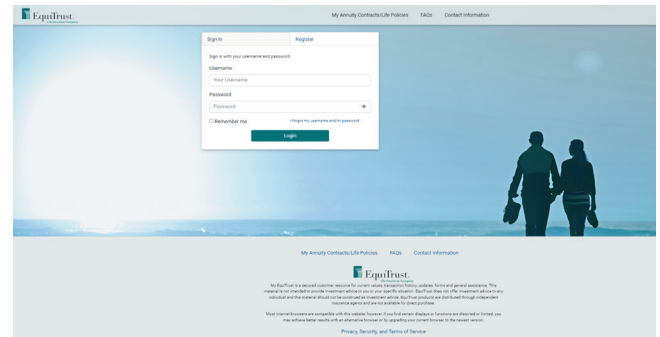
Let's Get Started

- Login to your My.EquiTrust.com account.
- A link for Upload A Doc will appear in the upper tool bar of the Home Page

Website Authentication Requirements

Upload A Doc requires Multi-Factor Authentication (MFA) for enhanced security.

- If your MFA preferences are not yet established, you will be directed to your Account Profile.
- If your MFA preferences are already set up, your identity will be verified through the normal MFA process.
- After your MFA preference is setup, you are now ready to use Upload A Doc.



Multi-Factor Registration Process

My EquiTrust offers you two levels of secured access to your contract and policy information: Primary Access or Detailed Access. You have already registered a My EquiTrust account for Primary Access, which provides a summary of your contracts or policies with a user name and password. Detailed Access provides your transaction history, account holdings, beneficiaries, and the ability to make certain changes online. For Detailed Access, you must have a mobile phone and complete authentication process which allows access only to your computer or mobile device.

Ready to begin Detailed Access?

You will be asked to choose an authentication process: Text Message or Authenticator App. Your selected authentication process will be required each time you login to My EquiTrust.

Option 1. Text Message: A six-digit code will be sent via text message* to your cell phone. Just enter the code when prompted along with your password.

[Text Message Access](#)

Option 2. Authenticator App: Free authenticator apps are available in your App Store for both Android and iPhone. Your authenticator app will read a QR code visible here to generate a six-digit code. Enter the code when prompted along with your password.

[Authenticator App Access](#)

[Opt Out](#)

*Message and data rates may apply.



How to Use Upload A Doc

1 From the Home Page, click Upload A Doc.

The Upload A Doc page features two tabs:

- Document Upload — To submit a new document to EquiTrust
- View Upload History — An overview of previously submitted documents, including:
 - Upload Date
 - Confirmation Number
 - Submitted By
 - File Name(s)

Document upload

2 At the Document Upload tab, enter your contract or policy number.

My Annuity Contracts/Life Policies FAQs Contact Information Contact Us Upload A Doc

My EquiTrust / Upload A Doc

Document Upload View Upload History

Document Upload

- We accept these file types: TIF, PDF, JPG, DOC.
- Limit combined document file sizes to under 30MB
- Requests received must be physically signed and dated. EquiTrust does not currently accept electronically signed requests.
- Photo images are not accepted. Forms submitted must be scanned.

For additional assistance with Upload A Doc, please [Click Here](#).

Enter Existing EquiTrust Contract/Policy #

[Add Files](#)

My Annuity Contracts/Life Policies FAQs Contact Information Contact Us Upload A Doc

My EquiTrust / Upload A Doc

Document Upload View Upload History

Upload speed may vary depending on your internet provider. Please do not exit or refresh this page until the upload is completed. Large files may take longer to upload.

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For additional assistance with Upload A Doc, please [Click Here](#).

Enter Existing EquiTrust Contract/Policy #

[Add More Files](#) [Remove All Files](#)

Total Uploaded Files Size: 444.14 KB

ET-PARTIAL-2501.pdf	147.18 KB
ET-SURR-2501.pdf	142.41 KB
ET-TRUST-2502.pdf	154.55 KB

[Start Upload](#)

Add Files

- 3 Click Add Files to retrieve a document or form from your computer files.
 - 4 Select the appropriate document from your files, then click Open.
 - 5 To upload additional documents, click Add More Files.
- File names of uploaded documents will appear on the screen.

For additional assistance with Upload A Doc, please [Click Here](#).

Enter Existing EquiTrust Contract/Policy #

[Add More Files](#) [Remove All Files](#)

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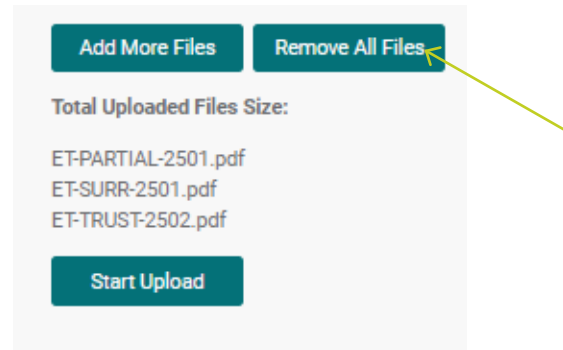
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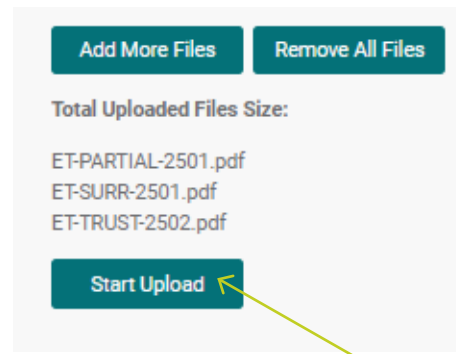
Removing Files

- 6 Click the trashcan icon located next to a file name and file size to delete an individual file.
- 7 To delete all documents at the same time, click the Remove All Files button.



Submit

- 8 When ready to submit, click Start Upload.
- Upon successful upload, a message will appear: “Success! The file upload is complete.”



Check Your Upload History

To view the details of the submitted document(s), go to the View Upload History.

That’s All There Is To It!

When finished, you may navigate around My.EquiTrust.com or log out.



866.598.3692 • Customer.Service@EquiTrust.com • My.EquiTrust.com