



# introducing your new portfolio summary

fast, convenient and secure

AXA is pleased to present your new portfolio summary, redesigned to be easy-to-read and understand while offering easy access to in-depth account details and servicing capabilities. We have listened to your feedback and have enhanced the page color, organization and white space to make important information stand out and improve navigation to frequently used functions. In the end, you get exactly what you need from your account – more information and control with fewer clicks!

### 1. Messages

We'll keep you posted on everything AXA from new investment opportunities to tax implication information.

### 2. Go Green

Help eliminate waste by getting your statements and prospectus online. Click to sign up now.

### 3. Personal Settings

Makes it easy for you to keep your account information up to date, such as changing your e-mail or street address and updating your eDelivery preferences.

### 4. Account Summary

This section gives you a quick look at your account values by product type (e.g., annuity, life insurance, brokerage), and allows you to check in with your advisor to ensure your needs are being met.

### 5. Manage Menu

Highlights all available service options for a policy or contract, from viewing account details and eStatements to completing financial transactions.

The screenshot shows the AXA portfolio summary dashboard. At the top right, there are navigation links for Messages, Contact, and Log Out, along with the user's name 'Hello, Spencer'. A 'Go Green' button is also visible. The main section is titled 'MY ACCOUNTS' and includes a navigation bar with links for CSR Options, Associate view, Show party IDs, Transaction history, and Blank client account letter. Below this, there are two large cards: 'Annuities' with a total value of \$1,311,862.28 and a 'CONTRACT' button, and 'Life Insurance' with a total value of \$31,862.27 and a 'POLICY' button. A 'Request a meeting' button is also present. The dashboard also features two tables: 'AXA Annuity Contracts' and 'AXA Life Insurance Policies'. The Annuity table has one entry for 'Equitable Life Account' with a contract number of 300-456-789 and an annuitant of JONATHAN SMITH. The Life Insurance table has one entry for 'Accumulator Adv (NQ)' with a policy number of 123-456-789 and an insured of JONATHAN SMITH. At the bottom, there is a 'My financial professional' section with profiles for Mark Neely and Keen Scher, and a 'Market Brief' section showing market indices like DJIA, NASDAQ, S&P 500, AXARY, and AB with their respective values and changes. The footer contains copyright information for 2014 AXA Equitable Life Insurance Company and links to the Online Privacy and Security Statement and Usage Agreement.

## 6. Contact

Connects you with your advisor or our helpful service teams.

- **Advice** — Request information or a meeting from your advisor.
- **Technical Support** — Get help for any technical issues you may be having with the site.
- **Product Help** — Send a question or request to our service team.

## 7. Stay On Track

Request a meeting with your advisor and take the next step in achieving your goals.

## 8. Feedback

We value your feedback and would like to know what you think about the improvements we are making.

## 9. View all investments

Shows all investment values for all policies.

## 10.+

Will show investment values for a single policy or contract.

## 11. My financial professional

Provides your advisor's contact information.

## 12. Market Brief

Tracks the performance of AXA and key benchmarks.

The screenshot displays the AXA client portal interface. At the top, it shows 'MY ACCOUNTS > CONTACTS' and a user greeting 'Hello, Spencer' with a 'Go Green' status and 'Personal settings' dropdown. Below this are three service tiles: 'ADVICE' (with a person icon), 'TECHNICAL SUPPORT' (with a lightbulb icon), and 'PRODUCT HELP' (with a lightbulb icon). A red box highlights the 'ADVICE' tile, with a callout '6' pointing to it. Below the tiles is a navigation bar with 'MY ACCOUNTS' and a 'Hello, Spencer' greeting. The main content area is divided into 'Annuities' and 'Life Insurance' sections. The 'Annuities' section shows a total value of \$1,311,862.28 and 1 contract. The 'Life Insurance' section shows a total value of \$31,862.27 and 1 policy. A callout '7' points to a 'Request a meeting' button in the Life Insurance section. Below these are tables for 'AXA Annuity Contracts' and 'AXA Life Insurance Policies'. The 'AXA Annuity Contracts' table lists 'Equitable Life Account' with a total value of \$1,311,862.28. The 'AXA Life Insurance Policies' table lists 'Accumulator Adv (NQ)' with a total value of \$211,862.27. Callouts '8' and '9' point to the 'View all investments' buttons in these tables. At the bottom, there are two sections: 'My financial professional' (with a callout '11' pointing to a profile card for Mark Neely and Keen Scher) and 'Market Brief' (with a callout '12' pointing to a table of market indices). A callout '10' points to a 'Feedback' button on the right side of the page. The footer contains copyright information for AXA Equitable Life Insurance Company.

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