

Instructions for ordering a Paperclip License (Digital Essentials Version)

Version Date: 01/10/2025

1. Click on this link: <https://register.paperclip.com/equitable>
2. Fill out all fields on the page below then click "Next" (Red Arrow)

PaperClip Incorporated

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Branch:

User ID: Must end in 32

Address:

City:

State:

Zip:

Phone:

Advisor Name

Full Name:

Title:

Email:

Support Contact ☐ Same as Advisor

Full Name:

Title:

Email:

Next

**EQUITABLE**
ADVISORS

Equitable Life Insurance Company, formerly The Equitable Life Assurance Society of the United States, headquartered in New York, NY, is a leading financial protection company and a premier provider of life insurance, annuities and related financial services.

3. Put a check mark next to "AXA Essentials Package", click "View Terms" and agree, then click "Next" (Red Arrows)

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Equitable Essentials Package

Equitable will cover the cost of an advisors first user and drawer. Subsequent users and drawers will be the responsibility of the advisor.

Item	Annual Fee	Quantity
Equitable Essentials Package (Includes 1 user and 1 drawer)	\$0.00	☒
Additional Items: Will be the responsibility of the Advisor.		
Additional Full Production Users ²	\$117.07	0
Additional Associate Drawer ¹	\$0.00	0
Additional Outside Business Drawer ¹	\$0.00	0
One time Set Up Fee (per added drawer)	\$110.44	0
Subscription Total:		0.00

¹A "Drawer" can be compared to a physical file cabinet's drawer. You can either choose to setup a separate drawer for each individual Financial Professional or you can setup a single drawer to be shared by your whole practice. It is recommended that you setup one drawer for each Financial Professional to enable more detailed security controls. These individual drawers, or a subset of the documents within the drawers, can be shared with other users. If you setup a single drawer for an entire practice, all clients and documents within the drawer are accessible by all other users of that same drawer.

²Price subject to platform total user discount if applicable.

You must read, view and agree to the complete terms of the agreement. Press 'View Terms' to continue.

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4. If you need to purchase additional drawers or licenses you just put the number you need in the boxes above
 - a. If you need an additional license for an assistant(s), put the number where the green arrow is pointing
 - b. If you need an additional drawer to share, put the number where the blue arrow is pointing
 - c. If you need a drawer for your OBA, put the number where the purple arrow is pointing
 - d. Depending on how many drawers you request you will see the onetime fee where the pink arrow is pointing
 - e. You will see the total to be charged to your credit card where the orange arrow is pointing

5. Make sure your information is correct, confirm that you are not a robot then click "Subscribe"

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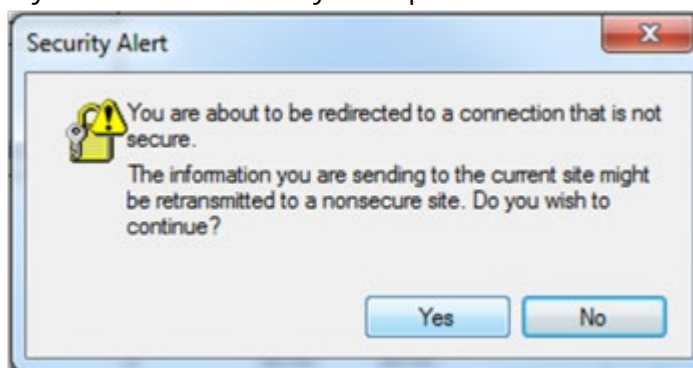
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Demographics Pricing Receipt	Date:	2/11/2021																													
	Branch:	THE LIBERTY																													
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	Address:	333 Thornall Street Edison NJ, 08837																													
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	Advisor Testy McTesterson Associate testy.McTesterson@equitable.com	Technical Testy McTesterson Associate testy.McTesterson@equitable.com																													
	<table><thead><tr><th>Item</th><th>Quantity</th><th>Price</th><th>Cost</th></tr></thead><tbody><tr><td>Equitable Essentials Package (includes 1 user and 1 drawer)</td><td>1</td><td>\$0.00</td><td>\$0.00</td></tr><tr><td>Full Production Users</td><td>0</td><td>\$117.07¹</td><td>\$0.00</td></tr><tr><td>Associate Drawers</td><td>0</td><td>\$0.00</td><td>\$0.00</td></tr><tr><td>Outside Business Drawers</td><td>0</td><td>\$0.00</td><td>\$0.00</td></tr><tr><td>One Time Set Up Fee - per drawer</td><td>0</td><td>\$110.44</td><td>\$0.00</td></tr><tr><td>Subscription Total:</td><td></td><td></td><td>0.00</td></tr></tbody></table>	Item	Quantity	Price	Cost	Equitable Essentials Package (includes 1 user and 1 drawer)	1	\$0.00	\$0.00	Full Production Users	0	\$117.07 ¹	\$0.00	Associate Drawers	0	\$0.00	\$0.00	Outside Business Drawers	0	\$0.00	\$0.00	One Time Set Up Fee - per drawer	0	\$110.44	\$0.00	Subscription Total:			0.00		
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	¹ Price subject to platform total user discount if applicable.																														
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	☐ I'm not a robot  reCAPTCHA Privacy - Terms																														
	Subscribe																														



6. If you receive a Security Alert please click "Yes"



7. Congratulations you are now enrolled in PaperClip.
8. The entire setup process can take up to two weeks, you will be notified by e-mail when it is ready.