



Equitable Advisors Custom Web Forms Request Process + FAQs

Equitable Advisors Custom Web Forms

Available forms:

- [Discovery Survey](#)
- [Standard Risk Tolerance Questionnaire](#)
- [401k Information Request Form](#)
- [Periodic Review Form](#)
- [Education Funding Form](#)

Request Process

If you would like to add any of these forms to your website, please email advisormartech@equitable.com with the following information:

- List of the forms you would like added
- Website Owner Name
- Website URL
- Where within your website's navigation you would like the forms placed
We typically recommend placing under the 'Tools & Resources' section, but the forms can be placed wherever you would like.

Once your request is received, we will add the form(s) to your website and let you know once they are live.

Frequently Asked Questions

How am I notified of form submissions? Form submissions will be sent via email to website owners. All form data is captured in an attached PDF. The email will include the form information, the page the form was downloaded on, and recommended follow up tasks.

Who receives form submissions? The website owner will receive the form notification; however additional emails can be added on CC or BCC within the notification. If you would like to add other emails to be copied on form submissions, please email advisormartech@equitable.com with the details around your request.

Are the form submissions captured in Marketing Suite? No, because these forms were custom developed by Equitable the form submissions are not captured in Marketing Suite today.

How will the forms look on my website? The forms are designed to inherit the style of the website they are placed on, so if you have a DBA-branded website, the forms will automatically take on the color scheme and font styles for your website.