

# **Equitable Life Assurance Society Archive**

**1762 – 1975**

**EL**                      **Equitable Life Assurance Society**                      **1762 - 1975**  
**Archive**

256 production units

### **Administrative history**

The Equitable Life Assurance Society was established under a Deed of Settlement of 1762 and enrolled in the Court of the King's Bench in 1765. A Declaration of Trust for the Society was agreed in draft on 16 Sept 1762 and executed on 27 Sept 1762.

The Society was originally known as the *Society for Equitable Assurances on Lives and Survivorships*. In 1893 the official title of the office became the *Equitable Life Assurance Society*, following registration under the Companies Acts and the drawing up of the Memorandum and Articles of Association. The Society was also referred to colloquially as *The Equitable* or *The Old Equitable*.

The Equitable Life Assurance Society was a mutual life assurance society, created and run for the benefit of its members. The Society offered long-term life assurance policies for either a specific period, or a whole life. The Society based their practice on the ideas of James Dodson, mathematician (b.1710-d.1757), who developed a scientific basis for calculating fair annual premiums using mortality research and probability studies. The success of this system enabled the Society to reduce premiums in 1777 and again in 1781. Following this, a system of bonuses was developed. The Society had 5,000 policies in force by 1799 and by 1810 that figure had risen to almost 10,000.

The chief executive officer of the Society was known as the 'Actuary'. The main business of the Society, the approval of life assurance policies, was undertaken by the Court of Directors. As a mutual society, members of the Society who attended the General Court had much influence on decisions that were taken and no resolutions could take effect until they had been approved at two meetings of the General Court. From 1786 the General Court also dealt with petitions of grievances that were submitted for consideration by members. The Memorandum and Articles of Association, adopted and registered in 1893, shifted power to the directors and gave a more centralised authority to the Society.

The Equitable Life Assurance Society acquired the University Life Assurance Society and the Reversionary Interest Society in 1919. It later acquired the Equitable Reversionary Interest Society in 1920.

The Society's first offices were in the parsonage of St Nicholas Acons in Nicholas Lane, City of London (1762-1774). Following this, the Society was located at Chatham Place, New Bridge Street, Blackfriars (1774-1863); Mansion House Street, Mansion House (1863-1924); Coleman Street, City of London (1924-c.1992); and Basinghall Street, City of London (c.1993- ).

The Society was closed to new business from 8 December 2000 following a House of Lords ruling against it in July 2000.

## **Provenance and Immediate source of acquisition**

In November 2006 the Actuarial Profession, comprised of the Faculty of Actuaries and the Institute of Actuaries, acquired by purchase the ownership and copyright of the archives of the Equitable Life Assurance Society up to 1950. Prior to the purchase, the archive had been owned and held by the Society.

Included in this purchase were the archives of the Equitable Reversionary Interest Society and the Reversionary Interest Society, which are held on deposit at the Guildhall Library and have been listed separately.

## **Scope and content**

The archive has been split between two locations within London - the Institute of Actuaries Library, Staple Inn, High Holborn, WC1V 7QJ and the Guildhall Library, Aldermanbury, EC2P 7HH. All pre-1830 items and some post-1830 items are held at the Institute. The Guildhall Library holds post-1830 items. The 1830 split broadly relates to the end of William Morgan's tenure as actuary, which ran from 1775-1830. Post-1950 items acquired in this archive relate to historical research, among them papers collected for the Society's bicentenary in 1962.

The items held at the Institute include original and printed deeds of settlement (1762-1910); minute books and records for the court of directors (1762-1848) and the general court of members (1765-1849); minutes of special committees (1765-1769); financial and accounting records (1767-1930) including audit records, cash books, general ledgers, receipts, valuation reports and mortgage records; litigation papers (1798-1904); policy records (1762-1963) including bonus records, claims books, mortality research papers, policy registers, premium receipts, proposal forms and prospectuses; publicity and marketing records (1762-1962) including photographs, published accounts and reports, scrapbooks, handbooks, promotional items, files compiled for historical research or on specific subjects (up to 1975); and manuscript volumes written by actuaries and mathematical practitioners (1747-1835).

The Institute also holds a collection of books that were part of the Equitable Life Assurance Society archive and these have been listed separately as a library acquisition. Please contact the Librarian at the Institute for further details.

Guildhall Library has a complete list of the items that it holds. Please contact Guildhall Library for further details.

## **Appraisal information**

In 1924 William Palin Elderton (president of the Society 1947-1953) subjected many of the series of records to sampling, usually keeping the earliest example of a volume, in addition to a few other volumes. Consequently, many series of records do not form complete 'runs'.

## **Accruals**

None.

The Equitable Life Assurance Society remains the owner of all other records dating from 1950 and is responsible for their administration.

## System of arrangement

The original order of the records has been maintained where possible. The archive has been divided into 6 categories and then arranged into 25 series of records reflecting either the form of the record, or the activities to which they relate. The categories and series are as follows:

EL/1	CORPORATE RECORDS
EL/1/1	Deeds of settlement and legal documents
EL/1/2	Court of directors' minute books
EL/1/3	Court of directors' records
EL/1/4	General court of members' minute books
EL/1/5	Committee papers
EL/2	FINANCIAL & ACCOUNTING RECORDS
EL/2/1	Audit records
EL/2/2	Cash books
EL/2/3	General ledgers
EL/2/4	Receipts and cheques
EL/2/5	Valuation reports and memoranda
EL/2/6	Mortgage records
EL/3	LEGAL RECORDS
EL/3/1	Litigation papers
EL/4	POLICY RECORDS
EL/4/1	Bonus records
EL/4/2	Claims books and memoranda
EL/4/3	Mortality research
EL/4/4	Policy forms and related items
EL/4/5	Policy registers

EL/4/6	Premium receipts
EL/4/7	Proposal forms
EL/4/8	Prospectuses
EL/5	PUBLICITY & MARKETING RECORDS
EL/5/1	Accounts, reports and addresses (speeches)
EL/5/2	Photographs
EL/5/3	Scrapbooks and promotional items
EL/5/4	Subject / Research File
EL/6	MANUSCRIPTS
EL6/1	Manuscripts

### **Access conditions**

24 hours notice is required to view items held at the Institute of Actuaries and at the Guildhall Library.  
Please contact each library for further details.

### **Reproduction conditions**

Please refer all enquiries relating to reproduction or publication conditions to the Librarian at the Institute of Actuaries.

### **Language**

English

### **Finding aids**

A database list and a paper list are available at the Institute of Actuaries.

### **Publication note**

Ogborn, M E (1962) *Equitable assurances. The story of life assurance in the experience of the Equitable Life Assurance Society*. George Allen and Unwin Ltd: London. This charts the history of the Equitable Life Assurance Society and the people who were associated with it. The book makes numerous references to records held within the archive, particularly to the minutes of the Court of Directors and General Court of Members.

### **Archivist's note and Dates of description**

Description written by Kate O'Brien, October 2007.

### **Rules**

Description based on the International Council on Archives *General International Standard of Archival Description, Second Edition* (2000).

<b>EL/1</b>	<b>CORPORATE RECORDS</b>	
<b>EL/1/1</b>	<b>Deeds of settlement and legal documents</b> Includes the original Deed of Settlement, a manuscript copy and several published editions of the deed. Also includes the Declaration of Trust and two draft copies and a printed copy of the Memorandum and Articles of association for the Society.	<b>1762 - 1910</b>
<b>EL/1/1/1</b>	<b>Original deed of settlement: 1 framed document, on vellum.</b>	<b>1762</b>
<b>EL/1/1/2</b>	<b>Deed of settlement, bound with minutes of the court of directors, 2 May 1765. Manuscript transcription of framed original: 1 volume.</b>	<b>1762 - 1765</b>
<b>EL/1/1/3</b>	<b>Declaration of trust: 1 document, on vellum.</b>	<b>27-Sep-1762</b>
<b>EL/1/1/4</b>	<b>Deed of settlement: 1 printed volume.</b>	<b>1777</b>
<b>EL/1/1/5</b>	<b>Deed of settlement: 1 printed volume.</b>	<b>1801</b>
<b>EL/1/1/6</b>	<b>Deed of settlement and four addresses by William Morgan: 1 printed volume.</b>	<b>1811</b>
<b>EL/1/1/7</b>	<b>Deed of settlement: 1 printed volume.</b>	<b>1833</b>
<b>EL/1/1/8</b>	<b>Deed of settlement, including bye laws and orders, and nine addresses by William Morgan: 1 printed volume.</b>	<b>1833</b>
<b>EL/1/1/9</b>	<b>Deed of settlement, including bye laws and orders, and nine addresses by William Morgan: 1 printed volume.</b>	<b>1833</b>

EL/1/1/10	Deed of settlement, including bye laws and orders, and nine addresses by William Morgan: 1 printed volume.	1833
EL/1/1/11	Deed of settlement: 1 printed volume.	1854
EL/1/1/12	Deed of settlement 1854, revised 1881: 1 printed volume.	1881
EL/1/1/13	Draft copy of the memorandum and articles of association, 1 <sup>st</sup> draft: 1 document.	1892
EL/1/1/14	Draft copy of the memorandum and articles of association: 1 document.	1892
EL/1/1/15	Copy of the memorandum and articles of association with special resolutions for 1910: 1 printed volume.	1910
<b>EL/1/2</b>	<p><b>Court of directors' minute books</b></p> <p>Consists of bound volumes of minutes. The minutes for the summoned court and the Weekly court were recorded separately before 1774 and after 1823. Between these dates the volumes contain the minutes from both the weekly and the summoned courts.</p> <p>A further 57 volumes for the weekly court (1834-1947) and 2 volumes for the summoned court (1834-1880) are located at Guildhall Library.</p>	<b>1762 – 1834</b>
EL/1/2/1	Summoned court of directors' minutes: 1 volume.	05-Jul-1765 - 13-May-1774
EL/1/2/2a	<p>Weekly court of directors' minutes "no. 01": 1 volume.</p> <p>There is a facsimile of this record, reference number EL/1/2/2b.</p>	16-Sep-1762 - 27-Dec-1763
EL/1/2/2b	<p>Weekly court of directors' minutes "no.01": 1 volume.</p> <p>Facsimile of EL/1/2/2a.</p>	16-Sep-1762 - 27-Dec-1763



<b>EL/1/2/3</b>	<b>Weekly court of directors' minutes "no.02": 1 volume.</b>	<b>03-Jan-1764 - 26-Mar-1765</b>
<b>EL/1/2/4</b>	<b>Weekly court of directors' minutes "no.03": 1 volume.</b>	<b>02-Apr-1765 - 18-Nov-1766</b>
<b>EL/1/2/5</b>	<b>Weekly court of directors' minutes "no.04": 1 volume.</b>	<b>25-Nov-1766 - 02-May-1769</b>
<b>EL/1/2/6</b>	<b>Weekly court of directors' minutes "no.05": 1 volume.</b>	<b>09-May-1769 - 23-Sep-1772</b>
<b>EL/1/2/7</b>	<b>Weekly court of directors' minutes "no.06": 1 volume.</b>	<b>30-Sep-1772 - 11-May-1774</b>
<b>EL/1/2/8</b>	<b>Weekly and summoned court of directors' minutes "no.07": 1 volume.</b>	<b>18-May-1774 - 06-Nov-1776</b>
<b>EL/1/2/9</b>	<b>Weekly and summoned court of directors' minutes "no.08": 1 volume.</b>	<b>13-Nov-1776 - 27-Oct-1779</b>
<b>EL/1/2/10</b>	<b>Weekly and summoned court of directors' minutes "no.09": 1 volume.</b>	<b>03-Nov-1779 - 09-May-1781</b>
<b>EL/1/2/11</b>	<b>Weekly and summoned court of directors' minutes "no.10": 1 volume.</b>	<b>16-May-1781 - 27-Nov-1782</b>
<b>EL/1/2/12</b>	<b>Weekly and summoned court of directors' minutes "no.11": 1 volume.</b>	<b>04-Dec-1782 - 11-Feb-1784</b>
<b>EL/1/2/13</b>	<b>Weekly and summoned court of directors' minutes "no.12": 1 volume.</b>	<b>18-Feb-1784 - 16-Mar-1785</b>
<b>EL/1/2/14</b>	<b>Weekly and summoned court of directors' minutes "no.13": 1 volume.</b>	<b>23-Mar-1785 - 14-Jun-1786</b>

<b>EL/1/2/15</b>	<b>Weekly and summoned court of directors' minutes "no.14": 1 volume.</b>	<b>21-Jun-1786 - 20-Jun-1787</b>
<b>EL/1/2/16</b>	<b>Weekly and summoned court of directors' minutes "no.15": 1 volume.</b>	<b>20-Jun-1787 - 28-May-1788</b>
<b>EL/1/2/17</b>	<b>Weekly and summoned court of directors' minutes "no.16": 1 volume.</b>	<b>04-Jun-1788 - 29-Apr-1789</b>
<b>EL/1/2/18</b>	<b>Weekly and summoned court of directors' minutes "no.17": 1 volume.</b>	<b>06-May-1789 - 03-Mar-1790</b>
<b>EL/1/2/19</b>	<b>Weekly and summoned court of directors' minutes "no.18": 1 volume.</b>	<b>10-Mar-1790 - 01-Dec-1790</b>
<b>EL/1/2/20</b>	<b>Weekly and summoned court of directors' minutes "no.19": 1 volume.</b>	<b>08-Dec-1790 - 03-Aug-1791</b>
<b>EL/1/2/21</b>	<b>Weekly and summoned court of directors' minutes "no.20": 1 volume.</b>	<b>10-Aug-1791 - 18-Apr-1792</b>
<b>EL/1/2/22</b>	<b>Weekly and summoned court of directors' minutes "no.21": 1 volume.</b>	<b>18-Apr-1792 - 16-Jan-1793</b>
<b>EL/1/2/23</b>	<b>Weekly and summoned court of directors' minutes "no.22": 1 volume.</b>	<b>23-Jan-1793 - 13-Nov-1793</b>
<b>EL/1/2/24</b>	<b>Weekly and summoned court of directors' minutes "no.23": 1 volume.</b>	<b>20-Nov-1793 - 17-Sep-1794</b>
<b>EL/1/2/25</b>	<b>Weekly and summoned court of directors' minutes "no.24": 1 volume.</b>	<b>24-Sep-1794 - 15-Jul-1795</b>
<b>EL/1/2/26</b>	<b>Weekly and summoned court of directors' minutes "no.25": 1 volume.</b>	<b>22-Jul-1795 - 11-May-1796</b>

<b>EL/1/2/27</b>	<b>Weekly and summoned court of directors' minutes "no.26": 1 volume.</b>	<b>18-May-1796 - 26-Apr-1797</b>
<b>EL/1/2/28</b>	<b>Weekly and summoned court of directors' minutes "no.27": 1 volume.</b>	<b>03-May-1797 - 23-Jun-1798</b>
<b>EL/1/2/29</b>	<b>Weekly and summoned court of directors' minutes "no.28": 1 volume.</b>	<b>27-Jun-1798 - 29-May-1799</b>
<b>EL/1/2/30</b>	<b>Weekly and summoned court of directors' minutes "no.29": 1 volume.</b>	<b>05-Jun-1799 - 14-may-1800</b>
<b>EL/1/2/31</b>	<b>Weekly and summoned court of directors' minutes "no.30": 1 volume.</b>	<b>21-May-1800 - 22-Apr-1801</b>
<b>EL/1/2/32</b>	<b>Weekly and summoned court of directors' minutes "no.31": 1 volume.</b>	<b>29-Apr-1801 - 17-Mar-1802</b>
<b>EL/1/2/33</b>	<b>Weekly and summoned court of directors' minutes "no.32": 1 volume.</b>	<b>24-Mar-1802 - 02-Feb-1803</b>
<b>EL/1/2/34</b>	<b>Weekly and summoned court of directors' minutes "no.33": 1 volume.</b>	<b>09-Feb-1803 - 08-Feb-1804</b>
<b>EL/1/2/35</b>	<b>Weekly and summoned court of directors' minutes "no.34": 1 volume.</b>	<b>15-Feb-1804 - 13-Mar-1805</b>
<b>EL/1/2/36</b>	<b>Weekly and summoned court of directors' minutes "no.35": 1 volume.</b>	<b>20-Mar-1805 - 07-May-1806</b>
<b>EL/1/2/37</b>	<b>Weekly and summoned court of directors' minutes "no.36": 1 volume.</b>	<b>14-May-1806 - 24-Jun-1807</b>
<b>EL/1/2/38</b>	<b>Weekly and summoned court of directors' minutes "no.37": 1 volume.</b>	<b>01-Jul-1807 - 03-Aug-1808</b>

<b>EL/1/2/39</b>	<b>Weekly and summoned court of directors' minutes "no.38": 1 volume.</b>	<b>10-Aug-1808 - 15-Nov-1809</b>
<b>EL/1/2/40</b>	<b>Weekly and summoned court of directors' minutes "no.39": 1 volume.</b>	<b>24-Nov-1809 - 16-Jan-1811</b>
<b>EL/1/2/41</b>	<b>Weekly and summoned court of directors' minutes "no.40": 1 volume.</b>	<b>23-Jan-1811 - 22-May-1812</b>
<b>EL/1/2/42</b>	<b>Weekly and summoned court of directors' minutes "no.41": 1 volume.</b>	<b>03-Jun-1812 - 22-Dec-1813</b>
<b>EL/1/2/43</b>	<b>Weekly and summoned court of directors' minutes "no.42": 1 volume.</b>	<b>29-Dec-1813 - 03-May-1815</b>
<b>EL/1/2/44</b>	<b>Weekly and summoned court of directors' minutes "no.43": 1 volume.</b>	<b>10-May-1815 - 08-Sep-1816</b>
<b>EL/1/2/45</b>	<b>Weekly and summoned court of directors' minutes "no.44": 1 volume.</b>	<b>25-Sep-1816 - 27-May-1818</b>
<b>EL/1/2/46</b>	<b>Weekly and summoned court of directors' minutes "no.45": 1 volume.</b>	<b>03-Jun-1818 - 26-Jan-1820</b>
<b>EL/1/2/47</b>	<b>Weekly and summoned court of directors' minutes "no.46": 1 volume.</b>	<b>02-Feb-1820 - 15-Aug-1821</b>
<b>EL/1/2/48</b>	<b>Weekly and summoned court of directors' minutes "no.47": 1 volume.</b>	<b>22-Aug-1822 - 12-Feb-1823</b>
<b>EL/1/2/49</b>	<b>Weekly and summoned court of directors' minutes "no.48": 1 volume.</b>	<b>18-Feb-1823 - 25-Aug-1824</b>
<b>EL/1/2/50</b>	<b>Weekly court of directors' minutes "no.49": 1 volume.</b>	<b>01-Sep-1824 - 01-Feb-1826</b>

EL/1/2/51	Weekly court of directors' minutes "no.50": 1 volume.	08-Feb-1826 - 08-Aug-1827
EL/1/2/52	Weekly court of directors' minutes "no.51": 1 volume.	15-Aug-1827 - 29-Apr-1829
EL/1/2/53	Weekly court of directors' minutes "no.52": 1 volume.	06-May-1829 - 28-Jul-1830
EL/1/2/54	Weekly court of directors' minutes "no.53": 1 volume.	04-Aug-1830 - 11-Apr-1832
EL/1/2/55	Weekly court of directors' minutes "no.54": 1 volume.	18-Apr-1832 - 19-Mar-1834
EL/1/2/56	Summoned court of directors' minutes: 1 volume.	26-Nov-1823 - 09-Jun-1834
<b>EL/1/3</b>	<b>Court of directors' records</b> Consists of rough minute books and an index to the minutes.  A further 2 index volumes (1830-1889) and 3 volumes of memoranda submitted to the weekly courts (1938-1951) are located at the Guildhall Library.	<b>1765 – 1848</b>
EL/1/3/1	Weekly court of directors' rough minutes "D": 1 volume.	09 Jul-1765 - 26-Dec-1769
EL/1/3/2	Summoned court of directors' rough minutes: 1 volume.	02-Jun-1768 - 13-May-1774
EL/1/3/3	Index to the orders of the court of directors: 1 volume.	18-May-1774 - 06-Sep-1848

<b>EL/1/4</b>	<b>General court of members' minute books</b> Consists of bound volumes of minutes. The director and other members were present at these meetings. Every quarter the accounts for that quarter were presented.  2 further volumes (1850-1893) are located at the Guildhall Library.	<b>1765 – 1849</b>
<b>EL/1/4/1</b>	<b>General court of members' minutes: 1 volume.</b>	<b>05-Jul-1765 - 07-Mar-1782</b>
<b>EL/1/4/2</b>	<b>General court of members' minutes: 1 volume.</b> The minutes in this volume have not been signed.	<b>02-May-1782 - 01-Sep-1796</b>
<b>EL/1/4/3</b>	<b>General court of member's minutes: 1 volume.</b> This volume appears to be a 'rough' minute book.	<b>05-Jul-1765 - 01-May-1780</b>
<b>EL/1/4/4</b>	<b>General court of members' minutes: 1 volume.</b>	<b>01-Jun-1780 - 21-Mar-1793</b>
<b>EL/1/4/5</b>	<b>General court of members' minutes: 1 volume.</b>	<b>26-Mar-1793 - 04-Dec-1806</b>
<b>EL/1/4/6</b>	<b>General court of members' minutes: 1 volume.</b>	<b>05-Mar-1807 - 17-Dec-1829</b>
<b>EL/1/4/7</b>	<b>General court of members' minutes: 1 volume.</b>	<b>04-Mar-1830 - 20-Dec-1849</b>
<b>EL/1/5</b>	<b>Committee papers</b> Guildhall Library also holds 1 volume of minutes of special committees (1892-1903).	<b>1765 - 1769</b>
<b>EL/1/5/1</b>	<b>Minutes of special committees: 1 volume.</b>	<b>20-Feb-1765 - 10-Oct-1769</b>

<b>EL/2</b>	<b>FINANCIAL AND ACCOUNTING RECORDS</b>	
<b>EL/2/1</b>	<b>Audit records</b>	<b>1872 - 1894</b>
<b>EL/2/1/1</b>	<b>Register of committee for auditing accounts: 1 volume.</b> Labelled 'audits'. Arranged by year, in quarters. Lists members of the committee and balance remaining.	<b>21-May-1872 - 09-Apr-1894</b>
<b>EL/2/2</b>	<b>Cash books</b> Consists of daily cash books and account books of cash paid for premiums.  Guildhall Library holds a volume of printed and audited general cash accounts (1834-51).	<b>1774 - 1817</b>
<b>EL/2/2/1</b>	<b>Account book of cash received for original premiums: 1 volume.</b>	<b>1774 - 1787</b>
<b>EL/2/2/2</b>	<b>Account book of cash received for original premiums: 1 volume.</b>	<b>1787 - 1794</b>
<b>EL/2/2/3</b>	<b>Daily cash book: 1 volume.</b>	<b>12-Oct-1815 - 07-Sep-1816</b>
<b>EL/2/2/4</b>	<b>Daily cash book: 1 volume.</b>	<b>09-Sep-1816 - 15-Jul-1817</b>

<b>EL/2/3</b>	<b>General ledgers</b> Consists of general accounts books, which include details of a range of different accounts; summaries of business taken out monthly; and weekly accounts.  Guildhall Library holds 3 volumes of annual accounts (1831-1883); 1 volume of annual income accounts (1840-1885); 1 volume recording monthly business (1844-1857); 2 volumes of balance sheets and revenue accounts (1888-1892 and 1910-1921).	<b>1767 - 1900</b>
<b>EL/2/3/1</b>	<b>Accounts book: 1 volume.</b> Includes accounts of claims paid and return of premiums; expenditure accounts; accounts of annuities; general cash accounts.	<b>1772 - 1775</b>
<b>EL/2/3/2</b>	<b>Accounts book: 1 volume.</b> Indexed. Includes cash accounts; accounts of stock; dividends of stock in public funds; claims and returns paid; expenditure accounts; cash paid to the Charter Fund; mortgage accounts.	<b>1776 - 1788</b>
<b>EL/2/3/3</b>	<b>Accounts book: 1 volume.</b> Indexed. Includes accounts of stock; dividends of stock in public funds and interest on mortgages; sundry expenditure; claims and returns on surrendered policies; cash paid out on mortgages; cash lent upon mortgages.	<b>1788 - 1799</b>
<b>EL/2/3/4</b>	<b>Accounts book: 1 volume.</b> Includes general cash accounts; cash received for stock and interest on mortgages; expenditure accounts.	<b>1800 - 1810</b>
<b>EL/2/3/5</b>	<b>Accounts book: 1 volume.</b> Includes general cash accounts; cash received for stock and interest on mortgages; cash paid for cancelled policies.	<b>1811 - 1819</b>
<b>EL/2/3/6</b>	<b>Accounts book: 1 volume.</b> Includes general cash accounts; expenditure accounts; cash received for stock and interest on mortgages; cash paid for surrendered additions.	<b>1820 - 1827</b>
<b>EL/2/3/7</b>	<b>Accounts book: 1 volume.</b> Includes general cash accounts; cash received for stock and interest on mortgages; cash paid for surrendered additions.	<b>1827 - 1830</b>
<b>EL/2/3/8</b>	<b>General annual cash accounts: 1 volume.</b>	<b>1767 - 1900</b>



<b>EL/2/3/9</b>	<b>Summaries of business taken out monthly: 1 volume.</b>	<b>1807 - 1830</b>
<b>EL/2/3/10</b>	<b>Weekly office accounts: 1 volume</b> Shows cash paid and received.	<b>1816 - 1824</b>
<b>EL/2/4</b>	<b>Receipts and cheques</b> Consists of receipts for building works, receipts for annuities and Bank of England cheques.	<b>1767 – [c.1830]</b>
<b>EL/2/4/1</b>	<b>Receipts for annuities of shares in entrance money: 1 volume.</b>	<b>1767 - 1781</b>
<b>EL/2/4/2</b>	<b>Receipts for works concerning rebuilding of the offices in Chatham Place: 1 box.</b>	<b>[c.1830]</b>
<b>EL/2/4/3</b>	<b>Bank of England cheques (signed by Sir Charles Morgan): 1 box.</b>	<b>1821</b>
<b>EL/2/5</b>	<b>Valuation reports and memoranda</b> Consists of decennial valuations, memoranda books relating to calculating valuations and reports relating to quinquennial valuations. Valuations were calculated every ten years from 1776 until 1899, after this date they were calculated every five years.	<b>1786 – 1930</b>
<b>EL/2/5/1</b>	<b>Valuations of individual policies: 1 volume</b> Arranged by month. Gives policy number.	<b>1786</b>
<b>EL/2/5/2</b>	<b>Decennial valuations: 1 volume.</b> Policies are listed in order of the year they were taken out. Gives policy number, sum assured, value and additions.	<b>1799</b>

EL/2/5/3	<b>Decennial valuations: 1 volume.</b> Policies are listed in order of the year they were taken out. Gives policy number, sum assured, value and additions.	1799
EL/2/5/4	<b>Decennial valuations: 1 volume [volume 1 of 3].</b> Policies are listed in order of the year they were taken out. Gives policy number, sum assured, value, addition, value of addition, value of annual payments.	1809
EL/2/5/5	<b>Decennial valuations: 1 volume [volume 2 of 3].</b> Policies are listed in order of the year they were taken out. Gives policy number, sum assured, value, addition, value of addition, value of annual payments.	1809
EL/2/5/6	<b>Decennial valuations: 1 volume [volume 3 of 3].</b> Policies are listed in order of the year they were taken out. Gives policy number, sum assured, value, addition, value of addition, value of annual payments.	1809
EL/2/5/7	<b>Decennial valuations: 1 volume [volume 1 of 4].</b> Arranged by year. Gives policy number, continuance, sum, value, value of annuities.	1819
EL/2/5/8	<b>Decennial valuations: 1 volume [volume 2 of 4].</b> Arranged by year. Gives policy number, continuance, sum, value, value of annuities.	1819
EL/2/5/9	<b>Decennial valuations: 1 volume [volume 3 of 4].</b> Arranged by year. Gives policy number, continuance, sum, value, value of annuities.	1819
EL/2/5/10	<b>Decennial valuations: 1 volume [volume 4 of 4].</b> Arranged by year. Gives policy number, continuance, sum, value, value of annuities.	1819

<b>EL/2/5/11</b>	<b>Decennial investigation: 1 volume.</b>	<b>1829</b>
<b>EL/2/5/12</b>	<b>Decennial investigation: 1 volume.</b>	<b>1839</b>
<b>EL/2/5/13</b>	<b>Decennial investigation: 1 volume.</b>	<b>1849</b>
<b>EL/2/5/14</b>	<b>Decennial investigation: 1 volume.</b>	<b>1859</b>
<b>EL/2/5/15</b>	<b>Draft report of the committee on quinquennial valuations and actuarial notes on valuations: 1 envelope containing 2 handwritten reports.</b>	<b>1906</b>
<b>EL/2/5/16</b>	<b>Reports to the directors in connection with the valuation as at 31 December 1914: 1 typescript volume.</b> The volume relates to the First World War (1914-1918), when claims increased due to wartime deaths.	<b>1914 - 1920</b>
<b>EL/2/5/17</b>	<b>Valuation memoranda: 1 typescript volume.</b> Gives instructions and formulae for valuations.	<b>1917</b>
<b>EL/2/5/18</b>	<b>Valuation memoranda: 1 volume.</b> Includes rough calculations, notes and instructions.	<b>c.1925</b>
<b>EL/2/5/19</b>	<b>Valuation memoranda: 1 typescript volume.</b> Gives instructions and some formulae for valuations.	<b>1930</b>
<b>EL/2/5/20</b>	<b>Valuation of assurances: 1 volume.</b> Labelled "1829". Calculations, arranged by year.	<b>1802 - 1814</b>

<b>EL/2/6</b>	<b>Mortgage records</b> The volumes give details of mortgages administered by the Society.  Guildhall Library holds 2 volumes of account books of interest on mortgages (1831-1888).	<b>1788 – 1860</b>
<b>EL/2/6/1</b>	<b>Mortgage book: 1 volume.</b> Indexed by surname of debtor. Gives name of debtor, when lent, in whose names, sum lent, half yearly interest, when due, when paid and sum paid.	<b>1826 - 1828</b>
<b>EL/2/6/2</b>	<b>Mortgage book: 1 volume.</b> Indexed by surname of debtor. Gives name of debtor, when lent, in whose names, sum lent, half yearly interest, when due, when paid and sum paid.	<b>1828 - 1835</b>
<b>EL/2/6/3</b>	<b>Mortgage book '1852-1859': 1 large volume.</b> Indexed by surname of debtor. Gives name of debtor, sum lent, when lent, in whose names and details of repayments. Also includes a summary of mortgages for 1850-1860.	<b>1788 - 1860</b>

<b>EL/3</b>	<b>LEGAL RECORDS</b>	
<b>EL/3/1</b>	<b>Litigation papers</b> Includes documents relating to a case against the Equitable Life Assurance Society called the 'Windus' case, relating to a Thomas Windus's loss of bonus rights; documents relating to the legal case between the Equitable Life Assurance Society and the General Accident Assurance Corporation; cases submitted for the opinion of Counsel.	<b>1798 – 1904</b>
<b>EL/3/1/1</b>	<b>Cases submitted for the opinion of Counsel: 1 bundle, 61 items.</b> Contains index to cases contained in bundle, arranged by year.	<b>1798 - 1890</b>
<b>EL/3/1/2</b>	<b>Judgements, petitions, letters and documents relating to the 'Windus' case: 1 volume.</b>	<b>1840 - 1875</b>
<b>EL/3/1/3</b>	<b>The 'Windus' case appeal heard in the House of Lords, case of the appellant: 1 printed volume.</b>	<b>c.1864</b>
<b>EL/3/1/4</b>	<b>The 'Windus' case appeal heard in the House of Lords, separate appendix of the appellant: 1 printed volume.</b>	<b>c.1864</b>
<b>EL/3/1/5</b>	<b>The 'Windus' case appeal heard in the House of Lords, joint appendix to the case of the appellant and the case of the respondents: 1 printed volume.</b>	<b>c.1864</b>
<b>EL/3/1/6</b>	<b>The 'Windus' case appeal heard in the House of Lords, the supplemental case and appendix of the appellant: 1 printed volume.</b>	<b>c.1864</b>
<b>EL/3/1/7</b>	<b>Papers on a legal case between the Equitable Life Assurance Society and the General Accident Assurance Corporation Ltd: 1 parcel.</b> Includes letters, court papers, witness statements and reports. Labelled 'Manly's case'. Ogborn states the loss of this case was a contributing factor in Henry William Manly's resignation from the post of actuary in 1905.	<b>c.1904</b>

<b>EL/4</b>	<b>POLICY RECORDS</b>	
<b>EL/4/1</b>	<b>Bonus records</b> Registers, signed deeds and memoranda relating to bonuses that have been surrendered. The registers give details of who the made application, policy number, date of policy, sum assured, life assured, present age, additions, present value, to whom paid and when paid.	<b>1825 – c1908</b>
<b>EL/4/1/1</b>	<b>Surrender of additions (bonuses) register: 1 volume.</b>	<b>1825 - 1828</b>
<b>EL/4/1/2</b>	<b>Surrender of additions (bonuses) register: 1 volume.</b>	<b>1829 - 1830</b>
<b>EL/4/1/3</b>	<b>Surrender of additions (bonuses) register: 1 volume.</b>	<b>1831 - 1832</b>
<b>EL/4/1/4</b>	<b>Deeds signed when additions (bonuses) were surrendered: 1 volume.</b>	<b>1825</b>
<b>EL/4/1/5</b>	<b>Deeds signed when additions (bonuses) were surrendered: 1 volume.</b>	<b>1830</b>
<b>EL/4/1/6</b>	<b>Memoranda and tables relating to the bonus system: 1 volume.</b>	<b>c.1908</b>

<b>EL/4/2</b>	<b>Claims books and memoranda</b> Books and memoranda relating to claims paid-out after a policy holder's death.	<b>1806 – 1869</b>
<b>EL/4/2/1</b>	<b>Claims book: 1 volume.</b> Gives policy number, name of deceased, age of death, date of death, cause of death, sum paid and date paid.	<b>1806 - 1814</b>
<b>EL/4/2/2</b>	<b>Claims book: 1 volume.</b> Gives policy number, name of deceased, age of death, date of death, cause of death, sum paid and date paid.	<b>1814 - 1827</b>
<b>EL/4/2/3</b>	<b>Claims book: 1 volume.</b> Gives policy number, name of deceased, age of death, date of death, cause of death, sum paid and date paid.	<b>1827 - 1833</b>
<b>EL/4/2/4</b>	<b>Claims book: 1 volume.</b> Gives name of deceased, when assured, policy number, date of death, sum paid and date paid.	<b>1826 - 1838</b>
<b>EL/4/2/5</b>	<b>Claims book: 1 volume.</b> Gives name of deceased, when assured, policy number, date of death, age at death, cause of death, sum, additions and prospective additions.	<b>1832 - 1838</b>
<b>EL/4/2/6</b>	<b>Claims book: 1 volume.</b> Gives name of deceased, when assured, policy number, date of death, age at death, cause of death, sum, additions and prospective additions.	<b>1838 - 1845</b>
<b>EL/4/2/7</b>	<b>Claims book: 1 volume.</b> Gives name of deceased, when assured, policy number, date of death, age at death, cause of death, sum, additions and prospective additions.	<b>1845 - 1852</b>
<b>EL/4/2/8</b>	<b>Claims book: 1 volume.</b> Gives date when due, date when allowed, date of death, name, date of policy, policy number, sum assured, amount payable, date of payment, to whom paid and sum paid for claim.	<b>1862 - 1869</b>
<b>EL/4/2/9</b>	<b>Memoranda book relating to claims: 1 volume.</b> Gives date, name, claim surrender or surrender of additions, and observations.	<b>1835 - 1848</b>

<b>EL/4/3</b>	<b>Mortality research</b> Consists of tables charting the expectation of human life, mortality investigations and one death register.	<b>1762 – 1963</b>
<b>EL/4/3/1</b>	<b>Register of deaths of policy holders: 1 volume.</b> Arranged by age of policy holder when first assured. Includes date assured, policy number, when died, duration of policy and age at death.	<b>1762 - 1829</b>
<b>EL/4/3/2</b>	<b>Annual accounts and tables of the expectation of human life: 1 volume.</b> Includes a list of all the members who are eligible for the office of director for 1819.	<b>1829 - 1848</b>
<b>EL/4/3/3</b>	<b>Tables showing the total number of persons assured in the Equitable Life Assurance Society and tables of the expectation of human life, 1762-1832: 1 printed volume.</b>	<b>1834</b>
<b>EL/4/3/4</b>	<b>Tables showing the total number of persons assured in the Equitable Life Assurance Society and tables of the expectation of human life, 1762-1832: 2 printed volumes.</b>	<b>1834</b>
<b>EL/4/3/5</b>	<b>Bound volume of tables of mortality relating to the Amicable Society, tables showing total number of persons assured in the Equitable Life Assurance Society and tables of the expectation of human life: 1 printed volume.</b>	<b>1834 - 1841</b>
<b>EL/4/3/6</b>	<b>Equitable mortality experience (aggregate): 1 volume.</b>	<b>1863 - 1893</b>
<b>EL/4/3/7</b>	<b>Equitable mortality experience, 1863 - 1893: 1 volume.</b>	<b>1908</b>
<b>EL/4/3/8</b>	<b>Mortality investigations: 1 volume.</b>	<b>1930 - 1963</b>



<b>EL/4/4</b>	<b>Policy forms and related items</b> Composite series of items relating to policies. Consists of reports, policy forms, classifications of assurances, legal documents, one letter and notices of assignment.	<b>1787 – 1909</b>
<b>EL/4/4/1</b>	<b>Assurance policies: 1 large bound volume.</b> This is a volume composed of different assurance policies from several years; they do not form a complete 'run' of policies. Some signatures have been cut out of the documents.	<b>1787 - 1909</b>
<b>EL/4/4/2</b>	<b>Legal documents labelled 'policy documents': 1 box file containing 13 items.</b> Contains a grant of rent charge, 13 Mar 1797; assurance policy, 5 Jul 1800; transfer of mortgage, 1 Jun 1795; assignment of an annuity, 30 Apr 1787; release of equity of redemption, 21 Jul 1796; deed for securing debt, 28 July 1809; assurance policy, 5 July 1820, probate of the will of Charles Dodgson, 22 Feb 1804; draft leasehold redemption of sinking fund policy, [post 1900]; probate of the will of Richard Stenton, 27 Jun 1806; grant of rent charge from James Skinner to Thomas Hudson, 28 Dec 1789; assignment of annuities and a policy of assurance, 1 Jun 1798; assignment in trust for creditors, 26 Jun 1797.	<b>1787 - c.1900</b>
<b>EL/4/4/3</b>	<b>Notices of assignments and deeds relating to policy holders: 1 bundle.</b>	<b>1790 - 1812</b>
<b>EL/4/4/4</b>	<b>Reports from personal medical advisors about the lives to be assured: 1 box containing 28 bundles.</b>	<b>1790 - 1810</b>
<b>EL/4/4/5</b>	<b>Letter from William Morgan to William Gunner about a policy for a Mrs Ridge: 1 sheet.</b>	<b>31-Mar-1814</b>
<b>EL/4/4/6</b>	<b>Classification of assurances: 1 volume.</b> Arranged by age. Gives year of admission, total number assured, sum assured, premiums and additions.	<b>1829</b>

<b>EL/4/5</b>	<p><b>Policy registers</b> Consists of policy ledgers, indexes of policy holders known as 'alphabets', ticket books and loose tickets and docketts of policies.</p> <p>Prior to 1891 the particulars relating to policies were spread over five sets of books: policy ledgers, docketts of policies, ticket books, registers of notices of assignment and policy loan registers. Information relating to a single policy would be split across these records. In 1908 'policy registers' were introduced. These registers included all the information about a single policy on one page. All policies from 1891 (after policy number 13,787) were transcribed into the new registers. Docketts of policies were used until 1888.</p> <p>Guildhall Library holds 1 volume of docketts for policy numbers 12309-13275 (1880-1888); 1 volume of 'alphabets' (1860-1900); 3 policy ledgers relating to claims and surrenders (1840-1871, 1881-1905); 5 volumes of policy registers (1908-1976).</p>	<b>1762 – 1840</b>
<b>EL/4/5/1</b>	<p><b>'Alphabet', index of policy holders: 1 volume.</b> Arranged by initial letter and first vowel in surname. Gives name, occupation, policy number, sum assured and term.</p>	<b>1762 - 1773</b>
<b>EL/4/5/2</b>	<p><b>'Alphabet', index of policy holders: 1 volume.</b> Arranged by initial letter and first vowel in surname. Gives name, age, year, policy number, sum assured, term and 'off' (claim/surrender).</p>	<b>1774 - 1791</b>
<b>EL/4/5/3</b>	<p><b>'Alphabet', index of policy holders: 1 volume.</b> Arranged by initial letter and first vowel in surname. Gives name, age, year, policy number, sum assured, term and 'off' (claim/surrender).</p>	<b>1792 - 1800</b>
<b>EL/4/5/4</b>	<p><b>'Alphabet', index of policy holders: 1 volume.</b> Arranged by initial letter and first vowel in surname. Gives name, age, year, policy number, sum assured, term and 'off' (claim/surrender).</p>	<b>1801 - 1816</b>
<b>EL/4/5/5</b>	<p><b>'Alphabet', index of policy holders: 1 volume.</b> Arranged by initial letter and first vowel in surname. Gives name, age, year, policy number, sum assured, term and 'off' (claim/surrender).</p>	<b>1817 - 1829</b>

EL/4/5/6	<p><b>'Alphabet', index of policy holders 1 volume.</b>          Arranged by initial letter and first vowel in surname. Gives name, age, year, policy number, sum assured, term and 'off' (claim/surrender).</p>	1829 - 1829
EL/4/5/7	<p><b>Ticket book: 1 volume.</b>          Indexed. Gives name, occupation, address, place and date of birth, age at entry, class of assurance, date of proposal and names of private referees.</p>	1772 - 1777
EL/4/5/8	<p><b>Ticket book: 1 volume.</b>          Indexed. Gives name, occupation, address, place and date of birth, age at entry, class of assurance, date of proposal and names of private referees.</p>	1777 - 1782
EL/4/5/9	<p><b>Ticket book "no.13": 1 volume.</b>          Indexed. Gives name, occupation, address, place and date of birth, age at entry, class of assurance, date of proposal and names of private referees. Contains note by G Lidstone explaining the system of policy registers.</p>	1798 - 1800
EL/4/5/10	<p><b>Ticket book "no.26": 1 volume.</b>          Indexed. Gives name, occupation, address, place and date of birth, age at entry, class of assurance, date of proposal and names of private referees. Contains note by G Lidstone explaining the system of policy registers.</p>	1824 - 1829
EL/4/5/11	<p><b>Ticket book "no.27": 1 volume.</b>          Indexed. Gives name, occupation, address, place and date of birth, age at entry, class of assurance, date of proposal and names of private referees. Contains note by G Lidstone explaining the system of policy registers.</p>	1829 - 1835
EL/4/5/12	<p><b>Loose 'tickets' in box labelled "docquets": 1 box file.</b>          Gives name, occupation, address, place and date of birth, age at entry, class of assurance, date of proposal and names of private referees.</p>	1824 - 1835

<b>EL/4/5/13</b>	<b>Dockets of policies "no.2, 1171-1951": 1 volume.</b> Arranged by policy number. Gives policy number, name, occupation, address, sum assured, amount of premium and date of policy.	<b>1767 - 1772</b>
<b>EL/4/5/14</b>	<b>Dockets of policies "no.3, 1952-2733": 1 volume.</b> Arranged by policy number. Gives policy number, name, occupation, address, sum assured, amount of premium and date of policy.	<b>1772 - 1775</b>
<b>EL/4/5/15</b>	<b>Dockets of policies "no.32, 29106-30096": 1 volume.</b> Arranged by policy number. Gives policy number, name, occupation, address, sum assured, amount of premium and date of policy.	<b>1814 - 1816</b>
<b>EL/4/5/16</b>	<b>Policy ledger for numbers 1-24 &amp; 275-2309: 1 volume.</b> Arranged alphabetically by surname of person assured. Gives name, date of policy, policy number, sum assured, age at entry, amount of premium and bonus additions. The break in the policy numbers is because policy 25 was numbered 275 to make the Society appear to have more members than it actually did.	<b>1762 - 1806</b>
<b>EL/4/5/17</b>	<b>Policy ledger for numbers 2310-5103: 1 volume.</b> Arranged alphabetically by surname of person assured. Gives name, date of policy, policy number, sum assured, age at entry, amount of premium and bonus additions.	<b>1774 - 1806</b>
<b>EL/4/5/18</b>	<b>Policy ledger for numbers 8195 to 14853: 1 large volume.</b> Arranged alphabetically and then by policy number. Gives name, date of policy, policy number, sum assured, age at entry, amount of premium and bonus additions.	<b>1788 - 1806</b>
<b>EL/4/5/19</b>	<b>Policy ledger for numbers 1-3430: 1 volume.</b> Arranged by policy number. Gives name, date of policy, policy number, sum assured, age at entry, amount of premium and bonus additions.	<b>1817 - 1840</b>

<b>EL/4/6</b>	<b>Premium receipts</b> Bound volumes of receipts for premiums and a policy receipt signature book.  Guildhall Library holds the policy receipt book for policy numbers 20480-3054, 1-10253 (1803-1868).	<b>1763 – 1809</b>
<b>EL/4/6/1</b>	<b>Policy receipt book, for policy numbers 2188 to 20479: 1 volume.</b> This is a signature book for the receipt of policies, it does not include information on policy holders.	<b>1775 - 1803</b>
<b>EL/4/6/2</b>	<b>Duplicates of receipts for premiums of assurance: 1 volume.</b>	<b>1763 - 1769</b>
<b>EL/4/6/3</b>	<b>Register of premiums paid: 1 volume.</b> Ordered alphabetically by person assured. Gives name, policy number, sum assured and when paid.	<b>1806 - 1809</b>
<b>EL/4/7</b>	<b>Proposal forms</b> Bound volumes of proposal forms, which were completed when a policy was first applied for. The forms include declarations on age and state of health.	<b>1764 – 1838</b>
<b>EL/4/7/1</b>	<b>Policy proposal forms, labelled "proposal book": 1 volume.</b>	<b>1764 - 1838</b>
<b>EL/4/7/2</b>	<b>Policy proposal forms "D", numbered 1-93: 1 volume.</b>	<b>1768 - 1771</b>
<b>EL/4/7/3</b>	<b>Policy proposal forms "H", numbered 1-500: 1 volume.</b>	<b>1770 - 1773</b>
<b>EL/4/7/4</b>	<b>Policy proposal forms "I", numbered 1-285: 1 volume.</b>	<b>1773 - 1774</b>

EL/4/7/5	Policy proposal forms "K", numbered 1-415: 1 volume.	1774 - 1776
EL/4/7/6	Policy proposal forms "X", numbered 472-960: 1 volume.	1786 - 1787
EL/4/7/7	Policy proposal forms "S", numbered 1-500: 1 volume.	1805 - 1806
EL/4/7/8	Policy proposal forms "G", numbered 1-496: 1 volume.	1820 - 1821
EL/4/8	<p><b>Prospectuses</b></p> <p>Consists of printed prospectuses, including the earliest prospectus by the actuary Edward Rowe Mores entitled 'A short account of the Society for Equitable Assurances' and another text by Mores entitled 'The plan of the Society'. Many of the printed prospectuses are shortened versions of the Mores text. Also included are pamphlets and leaflets advertising the services and policies of the Society. The series contains many duplicate items.</p>	1764 – c.1950
EL/4/8/1	Book entitled 'A short account of the Society for Equitable Assurances', by Edward Rowe Mores, 5th edition: 1 printed volume.	1764
EL/4/8/2	'The plan of the Society' by Edward Rowe Mores: 1 printed volume.	1766
EL/4/8/3	<p>Prospectuses entitled 'A short account of the Society for Equitable Assurances': 1 box file containing 14 items.</p> <p>Dated 1781, 1788, 1789, 1791, 1801, 1807, 1814, 1816, 1821, 1826, 1831, 1832 (2 copies) and 1846.</p>	1781 - 1846
EL/4/8/4	<p>Prospectuses entitled 'A short account of the Society for Equitable Assurances': 1 box file containing 10 items.</p> <p>Dated 1868, 1869, 1872, 1874, 1875, 1878, 1881, and 1886 (3 copies).</p>	1868 - 1886

<b>EL/4/8/5</b>	<b>Prospectuses: 1 volume.</b>	<b>1850 - 1915</b>
<b>EL/4/8/6</b>	<b>Prospectuses and leaflets: 1 box file containing 43 printed items.</b>	<b>c.1860 - c.1912</b>
<b>EL/4/8/7</b>	<p><b>Prospectuses and pamphlets: 1 box file.</b>                  Includes booklets about the ministers' pension and insurance fund, 1902 and 1928; 'The Companies Acts 1862 and 1890, memorandum and articles of association', c.1922; prospectuses for 1865, 1866, 1880, 1883, 1885, 1886, 1887, 1889 (7 copies), 1892 (2 copies), 1898, 1900 (2 copies), 1905, 1907 (5 copies), 1908 (2 copies), 1909, 1910, 1915 (2 copies), 1918 (3 copies), 1921, 1922, 1924, 1927, 1928, 1931, 1936; 'Federated superannuation system for universities' (5 copies), 1922; list of members of the City Carlton Club, 1922.</p>	<b>1865 - 1926</b>
<b>EL/4/8/8</b>	<b>Prospectuses: 1 volume.</b>	<b>1921 - c.1950</b>

<b>EL/5</b>	<b>PUBLICITY AND MARKETING RECORDS</b>	
<b>EL/5/1</b>	<b>Accounts, reports and addresses (speeches)</b> Composite series consisting of published reports, accounts and speeches made to the Society.	<b>1777 – c.1950</b>
<b>EL/5/1/1</b>	<b>Book containing 'A short account of the Society', 1796; William Morgan's addresses, 1793 and 1796; Deed of settlement and appendix, 1777; with manuscript additions: 1 printed volume.</b>	<b>1777 - 1796</b>
<b>EL/5/1/2</b>	<b>'A view of the rise and progress of the Equitable Society', by William Morgan: 1 printed volume.</b>	<b>1828</b>
<b>EL/5/1/3</b>	<b>'A view of the rise and progress of the Equitable Society', by William Morgan (2nd edition): 1 printed volume.</b>	<b>1829</b>
<b>EL/5/1/4</b>	<b>Reports made by the court of directors, cases submitted to counsel, nine addresses by William Morgan, three addresses by Arthur Morgan: 1 printed volume.</b>	<b>1854</b>
<b>EL/5/1/5</b>	<b>'Reports, leaflets etc 1825-1829': 1 box file containing 6 printed pamphlets.</b> Includes 'An account of the several life assurance companies established in London', by Francis Baily, 1810; 'A view of the rise and progress of the Equitable Society', by William Morgan, 1828; report of the court of directors, 1825; case submitted by the directors to Mssrs. Bell, Brougham and Bickersteth, 1829; statement made by the directors at a general court of the Society, 1829.	<b>1810 - 1829</b>



EL/5/1/6	<p><b>'Reports, leaflets etc 1830-1865': 1 box file containing 13 printed pamphlets.</b></p> <p>Includes a letter to 'the policy holders' about the amount held in the Capital and Reserved Fund, n.d.; letter to the directors about the 'inequalities of the existing system', by John Rodick Nicholls, 1856; letter to the members about 'the coming bonus and their prospects for the future', by C J Bunyon, 1859; 'A reply to the statements circulated in the recent advertisements and prospectus of the Scottish Widows' Fund Society respecting the Equitable', by Arthur Morgan, 1865 (2 copies); prospectus, 1862 (2 copies); printed booklet of correspondence between Arthur Morgan (Equitable) and Samuel Raleigh (Scottish Widows Fund), 1865; printed booklet of two addresses delivered by Mr Morgan, 1831; supplement to prospectus, 1857; report made by the directors at a general court of the Society, 1832 and 1833; 'Observations on the operation of the bye-law of 19 December 1816', by Arthur Morgan, 1837.</p>	1831 - 1865
EL/5/1/7	<p><b>Addresses by Henry William Manly: 1 printed volume.</b></p>	1890 - 1896
EL/5/1/8	<p><b>'Report on the valuations of the Equitable Life Assurance Society', by Henry William Manly: 1 printed volume.</b></p>	1896
EL/5/1/9	<p><b>'Report on the valuations of the Equitable Life Assurance Society', by Henry William Manly: 1 printed volume.</b></p>	1899
EL/5/1/10	<p><b>'Report on the valuations of the Equitable Life Assurance Society', by Henry William Manly: 2 printed volumes.</b></p>	1900
EL/5/1/11	<p><b>Annual reports, annual accounts, and consolidated accounts: 1 volume.</b></p>	c.1900 - c.1950

<b>EL/5/2</b>	<b>Photographs</b>	<b>1900 - 1942</b>
<b>EL/5/2/1</b>	<b>Photograph of Londoners celebrating the 'relief of Mafeking' outside the Equitable Life Assurance Society's offices, Mansion House Street: 1 b&amp;w photograph.</b>	<b>May 1900</b>
<b>EL/5/2/2</b>	<b>Photograph album containing portraits and signatures of staff, presented to William Palin Elderton on his retirement: 1 album.</b>	<b>1942</b>
<b>EL/5/3</b>	<b>Scrapbooks and promotional items</b> Composite series consisting of leaflets, scrapbooks of standard forms and stationery, official Christmas cards and a staff instruction book.	<b>1906 – c.1950</b>
<b>EL/5/3/1</b>	<b>Staff instructions: 1 volume.</b> Contains office regulations, office duties and notes on how certain records should be arranged or filed.	<b>1906 - 1910</b>
<b>EL/5/3/2</b>	<b>Leaflets advertising a range of policies: 1 metal box.</b> Contains many duplicate items.	<b>1920 - c.1950</b>
<b>EL/5/3/3</b>	<b>Scrapbook of standard stationery, leaflets and forms (compiled c.1982): 1 volume.</b>	<b>c.1920 - c.1950</b>
<b>EL/5/3/4</b>	<b>Scrapbook of stationery samples, standard correspondence and leaflets relating to the Equitable Life Assurance Society and the University Life Assurance Society: 1 volume.</b>	<b>1930 - c.1950</b>
<b>EL/5/3/5</b>	<b>Equitable Christmas cards and family trees: 1 envelope.</b>	<b>1936 - 1939</b>

<b>EL/5/4</b>	<p><b>Subject / Research Files</b></p> <p>Consists of files that contain a wide variety of materials. Some files relate to a specific person, or groups of people, others are general files that appear to have been compiled for the purposes of historical research or to chart particular events. Some files contain documents, letters and enquiries that were sent to the Equitable Life Assurance Society's 'muniments room'. The files also contain photographs, deeds, research notes, newspaper cuttings, journal articles, letters, copies of documents, pamphlets and leaflets.</p>	<b>1762 – 1975</b>
<b>EL/5/4/1</b>	<p><b>Richard Price: 1 box file.</b></p> <p>All papers relate to Richard Price, actuary. Consists of biographical notes; letters; Price family trees; biographical notes and letters relating to the Hennell family, makers of the coffee pot presented to Price by the Equitable Life Assurance Society; photograph of memorial to Price; copy of the Newington Church register for 1890; photographs of Newington Green, 1925; articles; portrait of Price; manuscript copy of Price's advice to Pitt, 1787; letter from Price to Richard Day, 1786; photocopies of letters from Price.</p>	<b>1786 - c.1950</b>
<b>EL/5/4/2</b>	<p><b>Sir William Palin Elderton: 1 box file.</b></p> <p>Papers relate to Elderton, president of the Society (b.1877-d.1962). Consists of a copy of 'Frequency curves and correlation' by Elderton; printed articles by Elderton; rough drafts and typescripts of articles; biographical articles about Elderton; papers relating to Elderton's appointment to the Society, 1913; correspondence between Elderton and Prof. Dr. Steffenson, 1935-1955; obituaries for Elderton; papers relating to Elderton's memorial service, 1962; 3 magazines for Streatham High School belonging to Enid Elderton, his wife, 1924-6.</p>	<b>1913 - 1962</b>
<b>EL/5/4/3</b>	<p><b>Sir William Palin Elderton and Richard C Fippard: 1 box file.</b></p> <p>Consists of a photograph of Fippard (d.1914); letters; pamphlets; typescripts of articles; a publishing contract relating to 'The construction of mortality and sickness tables' by Elderton and Fippard; corrected copies and typescripts of 'The construction of mortality and sickness tables'.</p>	<b>[c.1910] - [c.1950]</b>
<b>EL/5/4/4</b>	<p><b>William Morgan: 1 box file.</b></p> <p>Papers relate to William Morgan, actuary (b.1775-d.1830). Includes family trees; genealogical research notes; articles about Morgan; letters; enquiries and copies of documents.</p>	<b>[c.1930s]</b>

- EL/5/4/5**                      **Sir Charles Morgan, Bart.: 1 box file.**                      **[c.1930s]**  
 Sir Charles Gould (b.1726-d.1806) was president of the Society 1773-1806; in 1792 he became Sir Charles Morgan, Bart. His son, also Sir Charles Morgan, Bart (b.1760-d.1846) was president 1806-1846. This file holds papers relating to both these men, including postcards of the portrait of Sir Charles Morgan, Bart Sr. by Gainsborough, papers relating to the loan of the portrait to the Gainsborough exhibition and a programme of the exhibition, 1936; photocopies of letters from Sir Charles Morgan, Bart Jr., 1805-1818; copies of papers from the Tredegar collection in the National Library of Wales; papers relating to the gold cup presented to Sir Charles Morgan, Bart Sr. in 1787.
- EL/5/4/6**                      **James Dodson: 1 box file.**                      **[c.1960s]**  
 All papers relate to James Dodson Sr., actuary (b.1710-d.1757). Consists of biographical notes; a copy of his will dated 19 Feb 1765; copy of the will of John Pocock, vice president of the Society, dated 1773; baptism certificate of James Dodson Jr., 1742.
- EL/5/4/7**                      **Papers relating to policies: 1 box file.**                      **1810 - 1940**  
 Consists of a list of new assurances completed each year, 1762-1940; policy form no. 8929, 1788; typescript of list of premiums accepted on 26 Oct 1762, 1935; letters from William Morgan relating to policies, c. 1810; letters from Arthur Morgan relating to policies, c.1844.
- EL/5/4/8**                      **Solicitors of the Equitable Life Assurance Society: 1 box file.**                      **1819 - c.1950**  
 Consists of copies of portraits of some solicitors, including William Bray (b.1736-d.1832), Bertram Reginald Warren (b.1868-d.1952), Reginald Bray (b.1797-d.1879), Francis Robert Warren (b.1833-d.?) and Augustus Warren (b.1790-d.1853); an invoice from Bray and Warren solicitors, 1828; copy of a mortgage for Knight, 1828; copy of an assignment and surrender of land, 1819.
- EL/5/4/9**                      **Papers relating to different assurance offices: 1 box file.**                      **1823 - 1879**  
 Consists of notes and reports about the Amicable Society, Phoenix Assurance Company, Scottish Amicable Life Assurance Society, Insurance Institute of Yorkshire, Royal Liver Friendly Society, New Equitable Life Assurance Society, Scottish Widows' Fund and Royal Exchange Assurance; Reversionary Interest Society share certificates numbers 1800-1804, 1823; mortality reports for the Economic Life Assurance Society, 1862, and the Law Life Assurance Society, 1875; policy from Sun Fire-Office for William Bray and Augustus Warren, solicitors, 1825; policy from Westminster Society for Insurance, c.1800.

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| <b>EL/5/4/10</b> | <p><b>Papers relating to premises of the Equitable Life Assurance Society: 1 box file.</b><br/>                 Consists of colour postcards showing the offices in Mansion House Street; letters, research notes and diagrams relating to the history and location of the Society's various offices; papers relating to Robert Smirke, architect for the offices in Bridge Street; an account for building works in Bridge Street, 1829. Box file also contains 3 printing blocks showing the office in Mansion House Street and 1 showing a signature.</p>   | <b>1829 - c.1950</b> |
| <b>EL/5/4/11</b> | <p><b>Pamphlets on life assurance: 1 box file.</b><br/>                 The pamphlets include a booklet by the British Insurance Association about the history of insurance, c.1950; 'War risks, supplement to Bourne's insurance year book', 1939; 'The birthplace of life assurance' by J G Anderson, 1936; 'On the assurance risks incident to professional military and naval lives', report to the Gresham Life Assurance Society, by A H Smee and T G Ackland, 1890; 'Net premiums for insurance against fatal accidents according to age and sex' by William Farr, 1880; 'Observations on the efficient valuation of friendly societies' by F G P Neison, 1885; 'An analysis of the profits of life assurance' by James Meikle, 1865; 'Les tables de mortalite' by A J Van Pesch, 1886 (French); 'Observations on a bill to amend the law relating to life assurance companies' by Swinton Boulton, 1870.</p> | <b>1865 - c.1950</b> |
| <b>EL/5/4/12</b> | <p><b>People connected to the Equitable Life Assurance Society: 1 box file.</b><br/>                 Contains files relating to different people. The documents consist of letters containing information about individuals, notes and articles. The people included are George James Lidstone; Brooke Boothby, policy holder; William Bray; Joseph Cruttenden; Sir Richard Glyn Bart; Griffith Davies; Sir George Johnson; Dr Gowin Knight; Henry William Manly; Joshua Milne; Arthur Morgan; John Ware Stephenson; Sir Charles Morgan, Bart; John Pocock; John Silvester; the Twining family, including a history of the Twining tea and coffee merchant 1706 - 1931; the Unwin family; Anthony Webster; Steuart Macnaghten; copy of the will of William Mountaine, 1779.</p>  | <b>1919 - c.1950</b> |

- EL/5/4/13**                      **Photographs: 1 box file.**                      **c.1900 - 1962**  
 Photographs include portrait by Thomas Gainsborough of Charles Morgan; people attending the bicentenary banquet, 1962 (includes an index of who is in each photograph); model buildings used in the bicentenary exhibition, 1962; box and gavel made from the timbers of Staple Inn Hall, Institute of Actuaries after it was destroyed by a bomb in 1944; table and council chairs presented to the Institute of Actuaries by George James Lidstone, after the original set were destroyed in 1944; 4 photographs of Mr John Ware Stephenson, actuary 1870-1888; portrait of George James Lidstone, actuary 1905-1913; Dr Seymour Taylor, appointed medical officer in 1890; group of people entitled 'Star Life', 1910; Herbert Leslie Melville Tritton, president 1930-1940; Mr A Bartram, housekeeper; William Edwards, director and vice-president (b.1819-d.1907); Geoffrey Walter, director (b.1866-d.1922); portrait W W Hughes, 1961; Etloe House, Leyton, Essex, built by Edward Rowe Mores, actuary (b.1731-d.1778); Arthur Francis Burr ridge, actuary 1888-1893; John Evans Robson (d.1874); portrait Edmond Halley, astronomer (b.1656 - d.1742); portrait George J White, director.
- EL/5/4/14**                      **Papers relating to the Equitable Life Assurance Society: 1 box file.**                      **1762 - 1975**  
 Contains 'The London Evening Post', no.5436, 7-9 Sep 1762; correspondence relating to a lease for the south west branch office of the Society and the original lease, 1794; a guide for staff transferring to the Society's office at Aylesbury, 1975; 40 duplicate postcards showing Sir Charles Morgan, Bart; printed papers relating to the Society, 'handed over by the University Life Assurance Society', [c.1880s]; typed letters by E Simmons, the letters include news and lists of staff on service, Jul 1941, Oct 1941, Aug 1942, Dec 1942, Mar 1943, Jun 1943, Dec 1943 and 31 Mar 1944; letter to Arthur Morgan, 1842; advertising leaflets; prospectus, 1907; promotional leaflet for the Society's Coat of Arms, 1962; accounts and statements, 1889-1908; receipts for premiums, 1830-1849; colour photograph of a plaque (1821) in Brecon Town Hall.
- EL/5/4/15**                      **Historical research, journals and pictures: 1 box file.**                      **1789 - c.1960**  
 Contains a file entitled 'The Equitable Life' containing historical research notes, newspaper cuttings and leaflets; 'Chambers' Edinburgh Journal', 23 Mar 1844; colour picture of the Coat of Arms of the Society, 1962; 2 colour photographs showing a document relating to the population of Carlisle, document dated 1863; article about Ronald Aylmer Fisher, by M G Kendall, 1963; envelope containing newspaper clippings, leaflets and policy documents, 1789-1926; 5 colour photographs of H J Tappenden from the painting 'The Conversation Piece' by Edward Halliday; print of an engraving showing the front of Staple Inn Hall, facing onto High Holborn, London, 29 Sep 1800; b&w photograph showing the seal of Sir Charles Morgan, Bart; b&w photograph showing the courtyard of Staple Inn Hall, pre 1945; folder containing 3 tables of statistics, c.1960; 'The Policy Holder', vol.46 no.24, 13 Jun 1928; 'The Policy Insurance Weekly', vol.47 no.2278, 24 Jun 1928.

<b>EL/5/4/16</b>	<p><b>Papers relating to the Equitable Life Assurance Society: 1 box file.</b> Includes reports, lists of members, letters, receipts, newspaper cuttings, calculations by Elderton, a typescript draft of 'investments one hundred years ago' by Elderton, copy of a case submitted to counsel in 1892, transcript of the judgement from the High Court of Justice relating to the incorporation of the Society and exhibition boards displaying copies of documents.</p>	<b>1892 - 1936</b>
<b>EL/5/4/17</b>	<p><b>Papers collected by John Terrett: 1 box file.</b> The papers all relate to life assurance. Box file contains newspaper articles, extracts from journals and copies of speeches.</p>	<b>1933 - [c.1950]</b>
<b>EL/5/4/18</b>	<p><b>Papers relating to the Equitable Life Assurance Society: 1 box file (large).</b> Contains policies burnt by 'enemy action', 1940-1945; postcard of Church Street, Aylesbury, Buckinghamshire; photograph of John Forest Smith, chief medical officer 1929-1968; photograph of Elderton; photocopy of the Deed of Settlement; printed journals.</p>	<b>[c.1920] - [c.1950]</b>
<b>EL/5/4/19</b>	<p><b>Bicentenary celebration papers: 1 box file.</b> Visitors' book for the celebrations (contains names and addresses); programmes for the banquet, 27 Sep; invitations to the reception, 25 Sep; invitations to the banquet, 27 Sep; invitations to the dinner, 1 Nov; cards of admission to the exhibition; photographs showing the model buildings used for the exhibition, offices in Coleman Street, tomb of Richard Price, H D Beevers and J G Anderson; published articles relating to the celebrations; leaflets; press packs.</p>	<b>1962</b>
<b>EL/5/4/20</b>	<p><b>Bicentenary celebration papers: 1 box file.</b> Notes for press conferences; promotional leaflets relating to the site of the first office and the coat of arms; exhibition programmes; banquet programmes; photographs used in the exhibition; press releases; lists of gifts presented to the Society for the bicentenary; newspaper cuttings; congratulatory messages; letters of thanks for the celebration; timetable of events; briefing and description of the exhibition; copies of speeches read at the dinner; invitation list; draft seating plan.</p>	<b>1962</b>

<b>EL/6</b>	<b>MANUSCRIPTS</b>	
<b>EL/6/1</b>	<b>Manuscripts</b> Composite series consisting of manuscripts covering a range of topics. The authors include the actuaries James Dodson Sr. (b.1710-d.1757), Richard Price (b.1723-d.1791), William Morgan (b.1750-d.1833) and Arthur Morgan (b.1801-d.1870). There is also a notebook of calculations by Thomas Bayes, mathematician and Presbyterian minister (b.1702-d.1761). Bayes was a friend of Richard Price, but appears otherwise unconnected to the ELAS.	<b>1747 – 1835</b>
<b>EL/6/1/1a</b>	<b>Mathematical notebook, by Thomas Bayes: 1 volume.</b> For more details about this volume see Dale, A I (1986) 'A newly discovered result of Thomas Bayes' <i>Archive for history of exact sciences</i> 35:2. Held at the Institute of Actuaries library, reference RKN 43132. There is a facsimile copy of this volume, reference number EL/6/1/2b	<b>c.1747</b>
<b>EL/6/1/1b</b>	<b>Mathematical notebook, by Thomas Bayes: 1 volume.</b> Facsimile of EL/6/1/2a	<b>c.1747</b>
<b>EL/6/1/2a</b>	<b>'Tables', by James Dodson Sr.: 1 volume.</b> Includes tables of decrements; tables of present values of annuities; tables of premiums payable at various ages. There is a facsimile copy of this volume, reference number EL/6/1/3b.	<b>c.1756</b>
<b>EL/6/1/2b</b>	<b>'Tables', by James Dodson Sr.: 1 volume.</b> Includes tables of decrements; tables of present values of annuities; tables of premiums payable at various ages. Facsimile of EL/6/1/3a.	<b>c.1756</b>
<b>EL/6/1/5</b>	<b>'First lecture on insurances', by James Dodson Sr.: 1 volume.</b>	<b>c.1756</b>
<b>EL/6/1/4</b>	<b>'First lecture on insurances', by James Dodson Sr.: 1 volume.</b> Scribal copy, possibly in the hand of John Edwards, actuary.	<b>1768</b>
<b>EL/6/1/5</b>	<b>Book of letters from Richard Price to John Edwards, actuary: 1 volume.</b>	<b>1768 - 1771</b>



EL/6/1/6a	<b>'Observations on the proper method of keeping the accounts, and determining from year to year the state of the Society', by Richard Price: 1 volume.</b> There is a facsimile copy of this volume, reference number EL/6/1/7b.	c. 1774 - 1776
EL/6/1/6b	<b>'Observations on the proper method of keeping the accounts, and determining from year to year the state of the Society', by Richard Price: 1 volume.</b> Facsimile of EL/6/1/7a.	n.d.
EL/6/1/7	<b>Tables of annual premiums and tables of survivorships, by William Morgan: 1 volume.</b>	c.1780
EL/6/1/8a	<b>'Calculations of premiums' based on the Northampton mortality tables, by William Morgan: 1 volume.</b> There is a facsimile copy of this volume, reference number EL/6/1/9b	1781
EL/6/1/8b	<b>'Calculations of premiums' based on the Northampton mortality tables, by William Morgan, 1781: 1 volume.</b> Facsimile of EL/6/1/9a.	n.d.
EL/6/1/9	<b>Calculations of premiums based on the Northampton mortality tables, by William Morgan: 2 volumes.</b>	[1781]
EL/6/1/10	<b>'Table of premiums', by William Morgan: 1 volume.</b>	1781
EL/6/1/11	<b>'Yearly computation of expected deaths and of accounts showing the state of the Society', by William Morgan: 1 volume.</b>	1826
EL/6/1/12	<b>'Calculations', by Arthur Morgan: 1 volume.</b>	1835
EL/6/1/13	<b>Tables showing the progress of the London Annuity Society in its first 24 years (1765-1789), author unknown: 1 volume.</b> Possibly by Richard Price.	1789