

**Equitable Life Assurance Society**

**Ms 38646-85**

1803-1976. 125 production units.

24 HOURS NOTICE IS REQUIRED FOR ACCESS TO THESE RECORDS. MS 38664 IS SUBJECT TO A 70 YEAR CLOSURE PERIOD.

The Society for Equitable Assurances on Lives and Survivorships was formed in 1762. It was the first society to use a scientific form of life assurance which enabled the Equitable to accept a broad range of risks. By 1797 there were over 5,000 assurances in force.

The name 'Equitable Life Assurance Society' appeared in brochures by 1857, but the Society only became incorporated with this name in 1893.

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

The Society was based at Nicholas Lane (1762-74); New Bridge Street (1774-1870); Mansion House Street (1870-1924); Coleman Street (1924-c1992); and Basinghall Street (c1993- ). The Society was closed to new business in 2000.

In November 2006 the Actuarial Profession (comprising the Faculty of Actuaries and the Institute of Actuaries) funded the purchase acquisition of the records of Equitable Life up to 1950 (together with the records of the Reversionary Interest Society and the Equitable Reversionary Interest Society). The records covering the period circa 1830-circa 1950 were deposited in Guildhall Library. Records pre circa 1830 are held at the Institute of Actuaries. Visits to the Institute of Actuaries Library need to be arranged at least 24 hours in advance.

Enquiries relating to publication of pre-1950 records should be addressed to the Librarian at the Institute of Actuaries, Staple Inn, High Holborn, WC1V 7QJ. A very few post-1950 records were deposited in Guildhall Library at the same time; these are now Ms 38664/3-5 (policy registers). Ms 38664/3-5 are held as a deposit from Equitable Life and enquiries relating to access to these items should be addressed to Equitable Life.

The records at Guildhall Library comprise: minutes 1834-1951, and indexes 1830-89 (Ms 38646-52); financial records, 1831-1972 (Ms 38653-62); policy records, 1803-1976 (Ms 38663-76); correspondence, 1833-61 (Ms 38677); and policy forms and other operational records, [1870?]-1931 (Ms 38678-85). They were catalogued by a member of Guildhall Library staff in 2007.

A note at the front of the policy registers states that up to 1891 (policy number 13787), details of policies were entered in five books: policy ledgers; docket books (Ms 38667); ticket books; registers of notices of assignment (Ms 38668); and policy loan ledgers. The Institute of Actuaries holds policy ledgers, 1762-1806, 1817-40; docket books, 1767-75; 1814-16; and ticket books 1772-82, 1798-1800, 1824-35.

In 1908, new policy registers were compiled for all the policies up to number 13787 which were still in force (Ms 38664). These new registers contain all the information for each policy on a single page.

**24 HOURS NOTICE REQUIRED FOR ACCESS**

**Ms 38646**

**Equitable Life Assurance Society**

Weekly court of directors' minutes. 1834-1947.

Vols.1-29 are indexed in Ms 38649. Vols.34-57 are indexed integrally.

Minutes 1762-1834 are held at the Institute of Actuaries.

57v.

- |                                     |                                      |
|-------------------------------------|--------------------------------------|
| 1. 26 Mar 1834-6 Apr 1836 "no.55"   | 30. 1 Jan 1890-5 Aug 1891 "no.84"    |
| 2. 13 Apr 1836-4 Apr 1838 "no.56"   | 31. 12 Aug 1891-26 Apr 1893 "no.85"  |
| 3. 11 Apr 1838-4 Mar 1840 "no.57"   | 32. 26 Apr 1893-20 Feb 1895 "no.86"  |
| 4. 11 Mar 1840-9 Feb 1842 "no.58"   | 33. 27 Feb 1895-10 Mar 1897 "no.87"  |
| 5. 16 Feb 1842-3 Apr 1844 "no.59"   | 34. 17 Mar 1897-15 Feb 1899 "no.88"  |
| 6. 10 Apr 1844-6 May 1846 "no.60"   | 35. 22 Feb 1899-31 Dec 1900 "no.89"  |
| 7. 13 May 1846-23 Feb 1848 "no.61"  | 36. 2 Jan 1901-6 Aug 1902 "no.90"    |
| 8. 1 Mar 1848-2 Jan 1850 "no.62"    | 37. 6 Aug 1902-25 May 1904 "no.91"   |
| 9. 9 Jan 1850-25 Jun 1851 "no.63"   | 38. 1 Jun 1904-22 Nov 1905 "no.92"   |
| 10. 2 Jul 1851-9 Mar 1853 "no.64"   | 39. 29 Nov 1905-1 May 1907 "no.93"   |
| 11. 16 Mar 1853-10 Jan 1855 "no.65" | 40. 8 May 1907-15 Jul 1908 "no.94"   |
| 12. 17 Jan 1855-21 Jan 1857 "no.66" | 41. 22 Jul 1908-6 Oct 1909 "no.95"   |
| 13. 28 Jan 1857-2 Feb 1859 "no.67"  | 42. 13 Oct 1909-8 Mar 1911 "no.96"   |
| 14. 9 Feb 1859-26 Sep 1860 "no.68"  | 43. 15 Mar 1911-6 Nov 1912 "no.97"   |
| 15. 3 Oct 1860-16 Jul 1862 "no.69"  | 44. 13 Nov 1912-18 Mar 1914 "no.98"  |
| 16. 23 Jul 1862-15 Jun 1864 "no.70" | 45. 25 Mar 1914-11 Aug 1915 "no.99"  |
| 17. 22 Jun 1864-11 Apr 1866 "no.71" | 46. 25 Aug 1915-1 May 1918 "no.100"  |
| 18. 18 Apr 1866-12 Feb 1868 "no.72" | 47. 8 May 1918-22 Jun 1921 "no.101"  |
| 19. 19 Feb 1868-19 Jan 1870 "no.73" | 48. 29 Jun 1921-19 Dec 1923 "no.102" |
| 20. 26 Jan 1870-16 Aug 1871 "no.74" | 49. 2 Jan 1924-6 Jan 1926 "no.103"   |
| 21. 23 Aug 1871-20 Aug 1873 "no.75" | 50. 13 Jan 1926-2 Nov 1927 "no.104"  |
| 22. 27 Aug 1873-18 Aug 1875 "no.76" | 51. 9 Nov 1927-2 Apr 1930 "no.105"   |
| 23. 25 Aug 1875-19 Sep 1877 "no.77" | 52. 9 Apr 1930-22 Feb 1933 "no.106"  |
| 24. 26 Sep 1877-10 Dec 1879 "no.78" | 53. 1 Mar 1933-31 Jul 1935 "no.107"  |
| 25. 17 Dec 1879-12 Oct 1881 "no.79" | 54. 14 Aug 1935-10 Nov 1937 "no.108" |
| 26. 19 Oct 1881-27 Dec 1883 "no.80" | 55. 17 Nov 1937-31 Jan 1940 "no.109" |
| 27. 2 Jan 1884-27 Jan 1886 "no.81"  | 56. 14 Feb 1940-5 Apr 1944 "no.110"  |
| 28. 3 Feb 1886-29 Feb 1888 "no.82"  | 57. 19 Apr 1944-29 Oct 1947 "no.111" |
| 29. 7 Mar 1888-30 Dec 1889 "no.83"  |                                      |

**Ms 38647**

**Equitable Life Assurance Society**

Memoranda submitted to the weekly courts. 1938-51.

Indexed

3v.

1. 1938-41 "12"
2. 1941-6 "13"
3. 1947-51 "14"

**Ms 38648**

**Equitable Life Assurance Society**

Minutes of the summoned court and special court of directors. 1834-80.

The special court mainly approved agendas and minutes of the general court. The summoned court nominated directors and considered some issues.

Minutes of the summoned court 1768-1834 are held at the Institute of Actuaries.

Indexed in Ms 38649.

2v.

1. 1834-57
2. 1857-80

**24 HOURS NOTICE REQUIRED FOR ACCESS**

**Ms 38649**

**Equitable Life Assurance Society**

Indexes to the weekly and summoned court of directors' minutes (Ms 38648 – nb these continue to 1880 only). 1830-89.

2v.

1. 1830-64
2. 1864-89

**Ms 38650**

**Equitable Life Assurance Society**

General court minute books. 1850-93.

These general court meetings were held every quarter. At each meeting the accounts for the quarter were presented. Both the directors and other members were present.

Minutes 1765-1849 are held at the Institute of Actuaries.

2v.

1. 1850-69
2. 1869-93

**Ms 38651**

**Equitable Life Assurance Society**

Lists of members summoned to the general courts. 1836-43, 1847, [1888-92?], [1910?].

Arranged by initial letter of surname. They give name, address and policy number.

4v.

1. 1836-43, 1847 (surnames K-Z)
2. Undated (ca. 1888-92) (surnames A-J)
3. Undated (ca. 1888-93) (surnames K-Z)
4. Undated (ca. 1910) (surnames K-Z)

**Ms 38652**

**Equitable Life Assurance Society**

Minutes of special committees. 1892-1903.

1v.

**Ms 38653**

**Equitable Life Assurance Society**

Annual reports and accounts. 1870-1972.

Item 1 includes some manuscript annotations.

2 items comprising 1v (1) and 1 box file (2).

1. 1870-1905
2. 1899-1902, 1906-72

**24 HOURS NOTICE REQUIRED FOR ACCESS**

**Ms 38654**

**Equitable Life Assurance Society**

Reviews of mortgage securities, reversions and ground rents. 1909-33.  
Prepared for the forthcoming quinquennial valuation and distribution of profits.  
Vol.5 is printed. Volume for 1906 held at Staple Inn.

5v.

1. 1909
2. 1914
3. 1919
4. 1926
5. 1933

**Ms 38655**

**Equitable Life Assurance Society**

General cash accounts, 1834-51 (printed audited annual accounts). Also includes statement of the value of different assurances, 1839, 1849, 1851; and form letters to policy holders, ca. 1830-52.

1v.

**Ms 38656**

**Equitable Life Assurance Society**

Annual accounts ("General cash accounts"). 1831-83.  
Accounts books 1772-1830 are held at the Institute of Actuaries.

3v.

1. 1831-46
2. 1847-62
3. 1863-83

**Ms 38657**

**Equitable Life Assurance Society**

Annual income accounts. 1840-85.

1v.

**Ms 38658**

**Equitable Life Assurance Society**

Balance sheets and revenue accounts. 1888-92, 1910-21.

2v.

1. 1888-92
2. 1910-21

**Ms 38659**

**Equitable Life Assurance Society**

Record of monthly business. 1844-57.

1v.

**Ms 38660**

**Equitable Life Assurance Society**

Account books of interest on mortgages. 1831-88.

2v.

1. 1831-60
2. 1860-88

**24 HOURS NOTICE REQUIRED FOR ACCESS**

**Ms 38661**

**Equitable Life Assurance Society**

Account books of interest on policies. 1870-81.

1v.

**Ms 38662**

**Equitable Life Assurance Society**

Aylesbury office expenses. 1939-43.

1v.

**Ms 38663**

**Equitable Life Assurance Society**

“Alphabets”: index of policyholders, compiled 1860-1900.

Arranged by initial letter and first vowel of surname.

Gives name, age, year, policy number, sum assured, term and ‘off’ (claim or surrender).

Volumes for 1762-1829 held at the Institute of Actuaries.

1v.

**Ms 38664**

**Equitable Life Assurance Society**

Policy registers. 1908-76.

These registers were compiled from 1908 (vols.1-2), 1927 (vols.3-4) and 1961 (vol.5) of policies which were in force at that time. They therefore include policies which were taken out prior to the date of compilation. They are arranged by policy number

See introductory note 3 for details of records of earlier policies.

They give name, occupation, address, date of policy, policy no, sum assured, date of birth, age at entry, date of death, class of assurance, amount of premium, bonus additions, loans on policy and notices of assignment.

5v.

1. 1908-36 (policy numbers 4446-10831) “1”
2. 1908-38 (policy numbers 10832-12119) “2”
3. 1927-71 (policy numbers 12159-15829) “51”
4. 1927-75 (policy numbers 15844-17647) “52”
5. 1961-76 (policy numbers 99850-100349) “181”

Vols.2-5 RESTRICTED ACCESS: ENQUIRE AT MANUSCRIPTS DESK

**Ms 38665**

**Equitable Life Assurance Society**

Policy proposal forms. 1859-63.

Arranged by policy number (9310-9819).

Gives membership number, name, occupation, place and date of birth, residence, age, sum, term, references, note of illnesses, and dates proposed, appeared and approved.

Policy proposal forms 1764-1838 are held at the Institute of Actuaries.

1v.

**24 HOURS NOTICE REQUIRED FOR ACCESS**

**Ms 38666**

**Equitable Life Assurance Society**

Signed declarations of proposals. 1839-41, 1863-8.

Arranged by membership number. They give name, address, occupation, amount, age, note of illnesses, date and signatures of applicant and witness.

2v.

1. 1839-41
2. 1863-8

**Ms 38667**

**Equitable Life Assurance Society**

Dockets. 1880-8.

Arranged by policy number. Labelled "46". Earlier volumes, "2" (1767-72), "3" (1772-5), and "32" (1814-16) are held at the Institute of Actuaries.

Gives name, address, occupation, sum assured, age on entry, annual premium and date.

1v.

**Ms 38668**

**Equitable Life Assurance Society**

Register of assignments. 1830-62.

Arranged by policy number. Gives name, date of notice, when left, date of assignment, by and to whom assigned, and reference to notice.

1v.

**Ms 38669**

**Equitable Life Assurance Society**

Policy ledgers, relating to claims and surrenders. 1840-71, 1881-1905.

Arranged by policy number. Vol.2 is labelled "no.2 N.S."

Gives name and age of policy holder, date of claim or surrender, premiums received and amount paid to policy holder. Note all policy numbers are included in these ledgers.

3v.

1. 1840-58 (policy numbers 1-3426)
2. 1858-71 (policy numbers 1-3426)
3. 1881-1905 (policy numbers 6862-10022)

**Ms 38670**

**Equitable Life Assurance Society**

Policy receipt book, for policy numbers 20480-30754, 1-10253. 1803-68.

This is a signature book for the receipt of policies. It does not include information on policy holders.

The policy receipt book for numbers 2188-20479 (1775-1803) is held at the Institute of Actuaries.

1v.

**Ms 38671**

**Equitable Life Assurance Society**

Agreements for the commutation of premiums. 1860-2, 1870, 1880-1.

Arranged by date of agreement.

3v.

1. 1860-2
2. 1870
3. 1880-1

**24 HOURS NOTICE REQUIRED FOR ACCESS**

**Ms 38672**

**Equitable Life Assurance Society**

Policies cancelled. 1830-9, 1885-91.

Vol.1 is by month and by year. Vol.2 is by year only. These volumes do not contain information on policy holders

2v.

1. 1830-9
2. 1885-91

**Ms 38673**

**Equitable Life Assurance Society**

Register of old series policies (issued 1810-88), and new series assurances (issued 1817-86) existing 1884-8. 1884-8.

Labelled "Total under ages 1884". This volume does not have information on individual policy holders.

1v.

**Ms 38674**

**Equitable Life Assurance Society**

New assurances classed under ages. 1840-9, 1869-89.

2v.

1. 1840-9
2. 1869-89

**Ms 38675**

**Equitable Life Assurance Society**

Total number of policies issued each year by age of policy holder. 1868-89.

Labelled "Total under ages".

1v.

**Ms 38676**

**Equitable Life Assurance Society**

"Classification of assurances" as at 31 December 1878 and 1 November 1889. 1878 and 1889.

Arranged by year of admission and age.

Volume for 1829 held at the Institute of Actuaries.

2v.

1. 1878
2. 1889

**Ms 38677**

**Equitable Life Assurance Society**

Letter book. 1833-50.

Indexed

1v.

**Ms 38678**

**Equitable Life Assurance Society**

Orders for policies. 1834-43.

In-letters pasted into a volume.

1v.

**24 HOURS NOTICE REQUIRED FOR ACCESS**

**Ms 38679**

**Equitable Life Assurance Society**

In-letters concerning the issue of policies. 1855-61.

1 box.

**Ms 38680**

**Equitable Life Assurance Society**

Specimen policy forms. [1870?-1911?].

1v.

**Ms 38681**

**Equitable Life Assurance Society**

Scrapbook of forms for assurance proposals, annotated with number ordered, date and cost. 1925-31.

1v.

**Ms 38682**

**Equitable Life Assurance Society**

Notebook of provincial contacts and members (England and Scotland). 1913-14.

Mostly blank. Indexed by town. Gives date, town, name, address, occupation and remarks.

1v.

**Ms 38683**

**Equitable Life Assurance Society**

Scrapbook of leaflets and circulars to members. 1888-1903.

1v.

**Ms 38684**

**Equitable Life Assurance Society**

Quotation sheets (blank), undated (ca. 1924-5).

These are blank forms to be filled in by agents with an individual's details to show the expected return were they to take out a policy.

1 binder.

**Ms 38685**

**Equitable Life Assurance Society**

"Imitation type propaganda letters": letters sent to prospective and current policy-holders to encourage them to take out a policy or renew their policy. [1928-9?].

1 binder.