What is EZtransact®?

EZtransact is an online platform that allows advisors to submit client requests digitally for various contract-related transactions, such as Pre-Authorized Debit (PAD) requests, withdrawals, fund switches and more!

What types of transactions can I submit through EZtransact?

1. One time and recurring PAD requests
2. Fund switch
3. Withdrawal requests
4. Retirement Savings Plan to Retirement Income Fund conversions
5. Dollar cost averaging

How do I submit a request?

1. Log in to EZtransact.
2. Find the client contract.
3. Select the transaction type.
4. Fill in the required transaction details.
5. Review and submit the request.

Can I track if a client has signed the submitted request?

Yes, you can check the status under the "Transactions" tab on EZtransact Dashboard.

Can I cancel a request after submission?

Yes, you may cancel a transaction on the transaction tab on EZtransact Dashboard. Cancelations are available until the signatures are complete. Contact support if changes are needed after submission.

What should I do if I forget my password?

Click the ***Forgot Password?*** link on the login page and follow the instructions to reset your password.

Who do I contact for technical issues or questions?

Reach out to Advisor Services Monday to Friday from 8:30 a.m. – 7:30 p.m. ET at 1.866.884.7427, or by email **individualwealth@equitable.ca** for assistance.

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