

Savings & Retirement Supply Request Form

Quantity	Maximum	Form #	Pivotal Select Segregated Funds	Current version
	100	1112	Segregated Funds and Estate Planning	2020/06/30
	100	1165	Pivotal Select Investor Profile Questionnaire	2020/09/25
	100	1383	Pivotal Select Application (TFSA)	2022/03/11
	100	1384	Pivotal Select Application (Reg/Non-Reg)	2022/03/11
	100	1385	Pivotal Select at-a-Glance	2020/12/07
	100	1386	Pivotal Select Estate Class Brochure	2021/06/07
	100	1387	Pivotal Select Investment Class Brochure	2021/06/07
	100	1403	Pivotal Select Contract and Information Folder	2021/07/06
	100	1547	Pivotal Select Protection Class (100/100)	2020/12/07
	100	1548	Protection Class Client Brochure	2020/06/30
	100	1551	Pivotal Select Guarantee Fees	2021/06/07
	100	1611	Growing your guarantees	2019/03/19
	100	1657	Accelerate Your Savings - Automatic Payment Increase Option	2020/06/30
	100	1675	Insights into Non-Registered Taxation	2016/12/12
	100	1756	Pivotal Select Preferred Pricing (Client piece)	2020/06/30
	100	1759	Pivotal Select Preferred Pricing FAQ (Advisor piece)	2020/06/30
	100	1797	Pivotal Select Investor Profile	2021/06/07

Quantity	Maximum	Form #	Payout Annuity	Current version
	100	355	Payout Annuity Application	2022/03/08
	100	1244	Payout Annuities Client Brochure	2020/06/30

Quantity	Maximum	Form #	Guaranteed Interest Account	Current version
	100	796	GIA TFSA Application	2020/06/30
	100	799	GIA Application (Non-Reg, RRSP, RRIF, LIF)	2022/03/02
	100	1049	GIA Client Brochure	2020/06/30
	100	1116	GIA Product Facts	2020/06/30
	100	1655	GDA Auto-Laddering	2020/06/30
	100	1790	GIA Contract (Replaces Form #797 and #798)	2021/07/06

Quantity	Maximum	Form #	Savings & Retirement Materials	Current version
	100	1404	Product Comparison Guide	2020/06/30
	100	1514	Gradual Inheritance Strategy	2020/06/30
	100	1612	Online Banking & Client Access (client piece)	2020/06/30
	100	1613	Online Banking (advisor piece)	2020/06/30
	100	1618	Equitable Life Investment Advantage	2020/08/04
	100	1638	Equitable Life's Competitive Advantage	2022/06/02
	100	1690	Converting Your Savings into Retirement Income	2020/03/19

Quantity	Maximum	Form #	RSP & TFSA Materials	Current version
	100	1276	Tax Free Savings Account brochure	2020/06/20
	100	1352	Retirement Realities	2020/09/17
	100	1353	Choosing the right account type	2019/07/08
	100	1354	Borrowing money to save money	2020/09/25
	100	1355	A Retirement Savings Plan is just as relevant now as it was over 60	2020/09/17
	100	1357	How to manage your tax refund	2020/09/30
	100	1460A	What does your retirement bucket list include poster	2020/09/24
	100	1583	Make your money work for you!	2020/06/30
	100	1630	Tax-free money does exist if you know where to look	2020/06/30
	100	1899	Taking money out of your RSP	2020/09/17
	100	1909	When it is time to convert your RSP to a RIF	2020/09/17
	100	1910A	What did you wish for this year poster	2020/09/24

Advisors: Please request supplies from your MGA.

Please complete this form. Once complete, attach the form to an email and send to supply@equitable.ca

MGAs: You may also fax to 519.883.7424.

Note: Form numbers in **red** are required point of sale documents.

Name:
Email address:
Phone Number:
Shipping address:
Agent / MGA code: