



## Individual Wealth Supply Request Form

Once complete, attach the form to an email and send it to [supply@equitable.ca](mailto:supply@equitable.ca) or fax it to 519-883-7424.

Advisor Name:
Phone Number:
Advisor/MGA Code:

Shipping Address:
Email Address:

Form #	Point of Sale Materials	Quantity
355	Payout Annuity Application	
375SEL	Pivotal Select Segregated Fund Codes	
796*	Daily/Guaranteed Interest Account Application (TFSA)	
799*	Daily/Guaranteed Interest Account Application (Non-reg, RSP, RIF, LIF)	
1165	Pivotal Select Investor Profile Questionnaire	
1383*	Pivotal Select Application (TFSA)	
1384*	Pivotal Select Application (Non-reg, RSP, RIF, LIF)	
1403	Pivotal Select Contract and Information Folder	
1790*	Daily/Guaranteed Interest Account Contract	
2086*	Pivotal Select Application (FHSA)	
2087*	Daily/Guaranteed Interest Account Application (FHSA)	
* Submit this request digitally via EZcomplete® for faster processing		

Form #	Pivotal Select Segregated Fund	Quantity
1112	Segregated Funds and Estate Planning	
1385	Pivotal Select Product at a Glance	
1386+	Pivotal Select Estate Class Brochure	
1387+	Pivotal Select Investment Class Brochure	
1547	Pivotal Select Protection Class (advisor)	
1548+	Pivotal Select Protection Class (client)	
1675	Insights into non-registered taxation	
1756	Pivotal Select Preferred Pricing (client)	
1759	Understanding Equitable's Pivotal Select Preferred Pricing Program	
1797	Understanding Your Investor Profile	
1975	Pivotal Select Segregated Fund Chargeback Sales Charge Options	
2106	Corporately Owned Segregated Funds	
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Form #	Payout Annuity	Quantity
1244	Payout Annuities Client Brochure	
1511	Prescribed Annuities: Tax-efficient retirement income	
Form #	Fund Focus	Quantity
2093	Equitable Life ClearBridge Sustainable Global Infrastructure Income Fund Select	

Form #	Sales Strategies	Quantity
1303	Dollar Cost Averaging	
1305	The Right Time to Buy and Sell	
1404	Product Portfolio Comparison Guide	
1514	Gradual Inheritance Strategy	
1611	Growing your guarantee with resets	
1612	Online Banking & Client Access	
1613	Online Banking makes savings simple	
1618+	The Equitable Investment Advantage	
1638	Equitable's Competitive Advantage	
1690	Converting Your Savings into Retirement Income	
1885	Take emotions out of investing	
1965	Facts & Figures	
2125	Another Reason to Invest with Equitable	
+ Chinese version available. Check box beside quantity for Chinese version.		

Form #	Daily/Guaranteed Interest Account	Quantity
1049	Daily/Guaranteed Interest Account Client Brochure	
1116	Daily/Guaranteed Interest Account Product at a Glance	
1137	GIA versus GICs	
1655	Guaranteed Interest Account Laddering Option	

Form #	RSP, TFSA and FHSA	Quantity
1276	Tax-Free Savings Account Brochure	
1352	Retirement Realities	
1353	Choosing the Right Account Type	
1354	Borrowing Money to Save Money	
1355	A Retirement Savings Plan is just as relevant now as it was over 60 years	
1357	Managing a Retirement Savings Plan Tax Refund	
1460A	What does your retirement bucket list include (poster)	
1583	Make your money work for you!	
1630	Tax-Free money does exist if you know where to look	
1899	Taking money out of your RRSP	
1909	When it is time to convert your RRSP to a RRIF	
1910A	What did you wish for this year (poster)	
2089	First Home Savings Account (client)	