



Individual Wealth Supply Request Form

Once complete, attach the form to an email and send it to 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	
796*	Daily/Guaranteed Interest Account Application (TFSA)	
799*	Daily/Guaranteed Interest Account Application (Non-reg, RSP, RIF, LIF)	
1790*	Daily/Guaranteed Interest Account Contract	
2087*	Daily/Guaranteed Interest Account Application (FHSA)	
2241*	Equitable GIF Non-registered Application	
2242*	Equitable GIF TFSA Application	
2243*	Equitable GIF FHSA Application	
2244*	Equitable GIF Registered Application	
2245*	Equitable GIF Contract Provisions and Information Folder	
2272	Equitable Investor Profile Questionnaire	

* Submit this request digitally via EZcomplete® for faster processing

Form #	Equitable GIF segregated fund	Quantity
1675	Insights into non-registered taxation	
2106	Corporately Owned Segregated Funds	
2256	Equitable GIF Fees and Fund Codes	
2273	Equitable Guaranteed Investment Funds Product at a Glance	
2283+	Equitable Guaranteed Investment Funds Investment Class	
2284+	Equitable Guaranteed Investment Funds Estate Class	
2285+	Equitable Guaranteed Investment Funds Protection Class	
2286	Equitable Preferred Pricing program	
2291	Equitable GIF Understanding Sales Charge Options	

Form #	Payout Annuity	Quantity
1244	Payout Annuities Client Brochure	
1511	Prescribed Life Annuities: Tax-efficient retirement income	
1947	Payout Annuity Frequently Asked Questions	
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	
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	
2111	Build Your Business: Fully funding a client's FHSA	

Form #	Sales strategies	Quantity
1303	Dollar Cost Averaging	
1305	The Right Time to Buy and Sell	
1508	Non-Resident Transactions	
1514	Gradual Inheritance Strategy	
1612	Online Banking & Client Access	
1613	Online Banking makes savings simple	
1618+	Invest with Equitable	
1638	Equitable's Competitive Advantage	
1690	Converting Your Savings into Retirement Income	
1885	Emotional Investing	
1965	Facts & Figures	
2125	Another Reason to Invest with Equitable	

+ Chinese version available. Check box beside quantity for Chinese version.

March 2026