Equitable®

Insurance | Investments | Group Benefits

Online banking makes saving simple.

Did you know clients can make additional deposits to their Equitable savings plan through their financial institution's online banking service?

As an advisor, you'll love when clients make deposits using online banking because:

- You don't need to collect a cheque
- You can skip the hassle and cost involved in mailing a cheque
- You get paid the same way as you normally would
- You don't need to enter a trade ticket through FundSERV
- Deposits are applied based on the investment directions on file

Getting set up:

Once a client has logged into a financial institution's online banking service, the client will select the option to add a new payee, and search for "Equitable Life Savings Plan". When the client is asked for an account number, the client will input the Equitable savings plan contract number.

Clients will love the convenience of making deposits through online banking, and you'll love making it easy for them to save for their financial goals.

Deposits can be made to non-registered accounts, Tax-Free Savings Accounts, Registered Retirement Savings Plans and First Home Savings Accounts. The minimum deposit is $50 per fund and $500 per Guaranteed Deposit Account. We do not guarantee that every bank will allow payments to "Equitable Life Savings Plan" within their online banking service.

For advisor use only

® and ™ denotes a trademark of The Equitable Life Insurance Company of Canada.

1613(2026/10/15)