

## Savings & Retirement Supply Request Form

| Quantity | Maximum | Form # | Pivotal Select Segregated Funds                             | Current version |
|----------|---------|--------|---|-----------------|
|          | 100     | 1383   | Pivotal Select Application (TFSA)                           | 2019/04/01      |
|          | 100     | 1384   | Pivotal Select Application (Reg/Non-Reg)                    | 2019/04/01      |
|          | 100     | 1366   | Pivotal Select Fund Facts                                   | 2019/04/01      |
|          | 100     | 1403   | Pivotal Select Contract and Information Folder              | 2018/02/28      |
|          | 100     | 1112   | Segregated Funds and Estate Planning                        | 2017/07/31      |
|          | 100     | 1165   | Pivotal Select Investor Profile Questionnaire               | 2018/09/05      |
|          | 100     | 1385   | Pivotal Select Product at a Glance                          | 2019/03/19      |
|          | 100     | 1386   | Pivotal Select Estate Class Brochure                        | 2017/05/29      |
|          | 100     | 1387   | Pivotal Select Investment Class Brochure                    | 2017/05/29      |
|          | 25      | 1405   | Pivotal Select Advisor Guide                                | 2018/03/29      |
|          | 100     | 1547   | Protection Class (Advisor piece)                            | 2019/06/05      |
|          | 100     | 1548   | Protection Class Client Brochure                            | 2015/10/01      |
|          | 100     | 1551   | Pivotal Select Guarantee Fees                               | 2019/04/01      |
|          | 100     | 1611   | Growing your guarantees                                     | 2019/03/19      |
|          | 100     | 1657   | Accelerate Your Savings - Automatic Payment Increase Option | 2016/10/18      |
|          | 100     | 1675   | Insights into Non-Registered Taxation                       | 2016/12/12      |
|          | 100     | 1718   | Pivotal Select Investment Class (Advisor piece)             | 2017/07/25      |
|          | 100     | 1719   | Pivotal Select Estate Class (Advisor piece)                 | 2017/07/25      |
|          | 100     | 1756   | Pivotal Select Preferred Pricing (Client piece)             | 2018/03/23      |
|          | 100     | 1759   | Pivotal Select Preferred Pricing FAQ (Advisor piece)        | 2018/04/12      |
|          | 100     | 1797   | Understanding Your Investor Profile                         | 2019/02/19      |

| Quantity | Maximum | Form # | Payout Annuity                       | Current version |
|----------|---------|--------|--------------------------------------|-----------------|
|          | 100     | 355    | Payout Annuity Application           | 2017/05/29      |
|          | 25      | 1241   | Payout Annuities Advisor Guide       | 2019/06/21      |
|          | 100     | 1244   | Payout Annuities Client Brochure     | 2015/03/10      |
|          | 100     | 1369   | Payout Annuities Product at a Glance | 2015/03/10      |

| Quantity | Maximum | Form # | Guaranteed Interest Account                     | Current version |
|----------|---------|--------|---|-----------------|
|          | 100     | 796    | GIA TFSA Application                            | 2019/04/01      |
|          | 100     | 799    | GIA Application (Non Reg, RRSP, RRIF, LIF)      | 2019/04/01      |
|          | 100     | 1049   | GIA Client Brochure                             | 2014/11/27      |
|          | 100     | 1116   | GIA Product Facts                               | 2015/05/12      |
|          | 100     | 1137   | Guaranteed Investments - Are all created equal? | 2017/05/01      |
|          | 100     | 1655   | GDA Auto-Laddering                              | 2016/10/13      |
|          | 100     | 1790   | GIA Contract (Replaces Form #797 and #798)      | 2019/03/28      |

| Quantity | Maximum | Form # | <b>Savings &amp; Retirement Materials</b>      | Current version |
|----------|---------|--------|--|-----------------|
|          | 100     | 1404   | Product Comparison Guide                       | 2017/05/29      |
|          | 50      | 1514   | Gradual Inheritance Strategy                   | 2015/01/01      |
|          | 100     | 1612   | Online Banking & Client Access (client piece)  | 2016/04/10      |
|          | 100     | 1613   | Online Banking (advisor piece)                 | 2016/04/10      |
|          | 50      | 1618   | The Equitable Life Investment Advantage        | 2016/05/18      |
|          | 100     | 1638   | Equitable Life's Competitive Advantage         | 2016/08/25      |
|          | 100     | 1690   | Converting Your Savings into Retirement Income | 2018/10/04      |

| Quantity | Maximum | Form # | <b>RRSP &amp; TFSA Materials</b>                     | Current version |
|----------|---------|--------|--|-----------------|
|          | 100     | 1276   | Tax Free Savings Account brochure                    | 2019/03/12      |
|          | 100     | 1352   | RRSPs - It's Time                                    | 2015/11/26      |
|          | 100     | 1353   | Choosing the right account type                      | 2019/07/08      |
|          | 100     | 1354   | RRSP Loans – Less Tax, Better Retirement             | 2018/05/22      |
|          | 100     | 1355   | Benefits of RRSPs                                    | 2013/12/16      |
|          | 100     | 1356   | RRSP vs. Mortgage                                    | 2013/12/16      |
|          | 100     | 1357   | Are you saving enough for retirement?                | 2012/08/10      |
|          | 100     | 1583   | Make your money work for you!                        | 2019/01/14      |
|          | 100     | 1630   | Tax-free money does exist, if you know where to look | 2019/07/08      |
|          | 100     | 21SR   | Work Hard, Play Hard, Save Hard flyer                | 2013/12/13      |
|          | 5       | 20SR   | RRSP Poster  | 2013/12/13      |

**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](mailto:supply@equitable.ca)

**MGAs:** You may also fax to 519.883.7424.

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

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