



## Equitable Guaranteed Investment Funds Create A Household

Use this form to set up a household. To modify a household, please complete [form # 2249 \(Modify a Household\)](#).

Householding enhances the Preferred Pricing program for Equitable GIF contracts. It allows eligible family members living at the same address to form a household by completing this form. The value of all assets within a household is used to determine the appropriate Preferred Pricing discount tier applied to all household members. For additional information, review the [Equitable's Preferred Pricing Program \(#2286\)](#).

Householding is a feature that is exclusively available for Equitable GIF. For information on the Pivotal Select segregated fund Preferred Pricing program, refer to the [Pivotal Select Preferred Pricing Program](#) marketing piece.

### 1. Household owner who is creating the household

First name:	Last name:		
Address (number, street, and apartment)		City:	Postal code:
Email:		Equitable contract number(s) to be included in household:	

Eligible family members: To be added as a household member, the individual must:

- a) Live at the same address as the household owner, and
- b) Must be related to the household owner as either spouse (including common-law), child of owner/spouse (including step and foster children) or parent/step-parent of owner/spouse.

### 2. Names of additional household members

<b>Additional household member #1</b>			
First name:	Last name:	Email:	
Relationship to household owner:		Equitable contract number(s) to be included in household:	
<input type="checkbox"/> I confirm I live at the same address as the household owner (provided above).			

<b>Additional household member #2</b>			
First name:	Last name:	Email:	
Relationship to household owner:		Equitable contract number(s) to be included in household:	
<input type="checkbox"/> I confirm I live at the same address as the household owner (provided above).			

<b>Additional household member #3</b>			
First name:	Last name:	Email:	
Relationship to household owner:		Equitable contract number(s) to be included in household:	
<input type="checkbox"/> I confirm I live at the same address as the household owner (provided above).			

To add more household members, complete and submit an additional copy of this form, and write Additional Household Members at the top. A maximum of 10 individuals may belong to a household (including the household owner).



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### 3. Agreement and Signatures

- 1) **Householding rules:**
  - a) **Adding members:**
    - a. To be added as a household member, an individual must:
      - i) live at the same address as the household owner,
      - ii) be related to the household owner as either spouse (including common-law), child of owner/spouse (including step and foster children) or parent/step-parent of owner/spouse, and
      - iii) own an Equitable GIF contract.
    - b. Only the household owner can add new members. A new member must agree to be added to the household.
    - c. The consent of existing household members is not required for new members to be added to the household.
  - b) **Total members:** A household may not exceed ten total members.
  - c) **One household at a time:**
    - a. A person can only be part of one household at a time.
    - b. If a household member wants to create a new household, they will be removed from their current household before the new one is created.
  - d) **Address:** Once a person is part of a household, they will remain part of a household even if they no longer share an address with the household owner.
  - e) **Leaving the household:** Any member can leave the household at any time by completing the form # 2249 (Modify a Household) or by giving written notice to Equitable. No permission from the household owner or other members is needed.
  - f) **Joint contracts:** Joint contracts can be included in the householding program for Equitable GIF if both joint contract owners are members of the household.
  - g) **Death of the household owner:** If the household owner dies, the household is dissolved. Remaining members may choose to form a new household by submitting this form # 2248 (Create a Household).
  - h) **Identifying contracts and household members:** The household owner and members must identify which contracts are included in the household. If a contract has not been identified on this form, that contract will not be included in the household. If a person has not been named on this form, that person will not be included in the household. Equitable will not be responsible for identifying additional contracts or individuals that may be eligible to participate in a household. Equitable will not backdate management fee reductions for contracts that were not identified on this form, or for members that were not added to the household.
  - i) **Termination:** A household can be terminated at any time by the household owner. Upon termination, all householding benefits and corresponding Preferred Pricing discounts will be discontinued without notice to the other household members.
- 2) **Privacy and personal information:**
  - a) The personal information you have willingly provided to Equitable will be held in Equitable's files, and will be used for the purposes of administering the householding and/or Preferred Pricing program and communicating with household members about the householding and/or Preferred Pricing program.
  - b) For the above purposes, the personal information on file is accessible to, and may be exchanged with: authorized employees of Equitable; third parties retained by Equitable; and any other person or party whom you authorize.
  - c) Your personal information may be processed and stored outside of Canada and may therefore be subject to the laws of those jurisdictions.
  - d) See [equitable.ca](http://equitable.ca) for further details about Equitable's privacy practices and for information about how to contact Equitable's Privacy Officer.
- 3) **Sharing information:**
  - a) The cumulative value of all contracts included in the household, household member names, and the applied Preferred Pricing discount tier is available to any household member and/or their advisor.
  - b) The household owner and members cannot access values for contracts that they do not own. However, they may be able to estimate or deduce the value of other members' contracts based on the cumulative value of all contracts included in the household.
- 4) **Equitable's rights:**
  - a) Equitable reserves the right to terminate a household or remove a household member at any time.
  - b) Householding is a non-contractual benefit, and Equitable reserves the right to change or end the Preferred Pricing and/or householding program without notice.
  - c) After Equitable receives the completed request to Create a Household, we will process it as soon as possible. Equitable will not backdate requests.



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### 3. Agreement and Signatures (continued)

I confirm and acknowledge my agreement with the above, and I request to create/join the new household:

Householder owner name:	Signature:	Date (yyyy/mm/dd):
Householder member #1 name:	Signature:	Date (yyyy/mm/dd):
Householder member #2 name:	Signature:	Date (yyyy/mm/dd):
Householder member #3 name:	Signature:	Date (yyyy/mm/dd):