

Online banking makes saving simple.

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

As an advisor, you'll love when your 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 direction on file

Getting set up:

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

Your 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 (TFSA's), and Registered Retirement Savings Plans (RRSP's). The minimum deposit is \$50 per fund and \$500 per Guaranteed Deposit Account (GDA). We do not guarantee that every bank will allow payments to "Equitable Life Savings Plan" within their online banking service.

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