

EZstart™

What is the purpose of the EZstart tool?

EZstart is a presale tool to start the conversation between an Advisor and their client. The quick simple breakdown of what can be offered will assist in preparing the investment the client could make for their family.

Who can use the EZstart tool?

At this time, the EZstart tool is intended for advisor use only.

When will the EZstart explainer tool be available?

The EZstart tool is available as of Monday, May 2, 2022. Click here to access: **EZstart** | [EquiNet Equitable's advisor site](#).

Is EZstart mobile friendly?

Yes, the EZStart tool is built for optimal use on a smart phone. It can also be accessed on your tablet, laptop, or desktop computer.

How do I access EZstart in French?

The French version is available here: <https://advisor.equitable.ca/ezstart>

I am on the Potential Cash Value screen on EZstart and it shows the Payment Term as 20 years, how do I change it to 10 or 100 years?

Click the pencil icon in the right corner and you will be returned to the previous page to update the payment term at the bottom of the screen.

What dividend option is the default for the EZstart tool?

The default dividend option is Paid-up Additions. At this time, this default can't be updated on the EZstart tool.

Does the EZstart tool replace the Sales Illustration?

No, the EZstart tool is used to start a conversation between the Advisor and their client. A Sales Illustration is required if completing an application.

Can you help me understand the details page on EZstart?

Please contact your RSM to help review and understand the details page.

I am having issues accessing the EZstart tool; what can I do?

If you have access to the EquiNet® secure site, you should be able to access the EZstart tool. If you have an EquiNet ID but need help learning how to best use the EZstart tool, contact your RSM who can help you get started.

How do I get more information and or training on this tool?

EZstart is a presale tool to start the conversation between an Advisor and their client. For more information and training, please speak to your RSM about EZstart or log into EquiNet where you'll find it on the toolbar ribbon.

Is the EZstart tool available for other products like UL, Term, and CI?

Currently, the EZstart tool is for Whole Life and Universal Life products. Equitable is actively working to make it available for our other products.

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