

Completing the 693UL FAQ

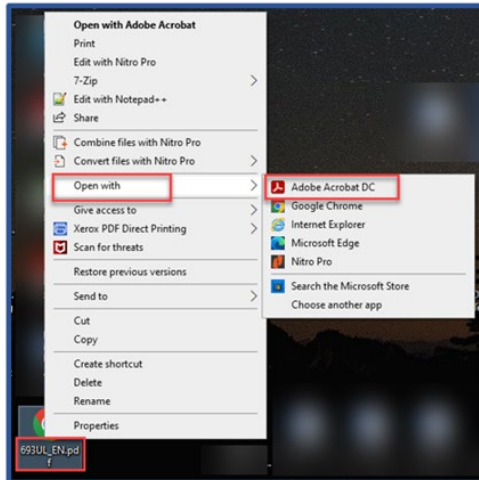
Q I am trying to use the new 693UL Reallocation form and there is a message I need to open the form in Adobe, what does this mean?

A The new form is dynamic and must be downloaded from EquiNet and opened in Adobe, at this time the document must be completed on a computer and not a mobile device. See, [Guide to Completing Form 693UL](#).

Q I have downloaded Adobe, and the form will not open?

A

- To open the form, download it to your computer, right click and click open with Adobe and the form will populate.



Q Can I use the old form 693UL?

A The older version of form 693UL is no longer available as investment options changed, which is why a new form was created.

Q When I open the form, I don't see the investment options?

A The form is dynamic, and sections will populate as you make selections based on the request. See, [Guide to Completing form 693UL](#), for examples.

Q Regarding the 693UL form, when transferring existing investments to a GDA, how does the client indicate the length of the term?

A To add the length of term for the GDA, please add this information in a note. We will be making changes to this form to include this information shortly.

Q Can I submit a Letter of Direction instead?

A Unfortunately, no, to complete the request accurately our processors need the completed form sent to Equitable Life.

Q Can I have this form eSigned?

A Yes, ensuring that esign@equitable.ca is included as a non-signing participant will ensure prompt processing.

Q On the 693UL form, do I use the \$ or % section?

A

- It really depends on how the requestor submits the transfer. The % on the right-hand side is there in the event that the requestor submits the transfer a different way:

As an example-100% transfer from American to CDN equity 55 to EURO- 45%

They are using % on the far right to allocate the transfer to. Most times the requestor will use the initial % sign on the left to allocate the transfer, but some don't, especially if they want 100% of one fund moved to multiple funds with different percentages, they keep adding lines in the to field to make up 100% of the transfer.