



CUSTOM QUOTE - DIA/GIA

Deposits under \$1 million can be made into a Daily Interest Account (DIA) or Guaranteed Interest Account (GIA) without approval. For deposits of \$1 million or more, please complete and submit this form. We will review each request individually, and if approved, we will provide you with a custom interest rate. Please note that a custom interest only applies to a GIA deposit of \$1 million or more. Equitable reserves the right to change these limits without prior notice. We may also decline to quote at our discretion.

1. ADVISOR INFORMATION

Advisor name:

Advisor email address:

Advisor phone number:

2. CLIENT INFORMATION

Annuitant's name:

Annuitant's age:

Owner's name (if different than the annuitant):

3. DEPOSIT INFORMATION

Allocate the deposit to:

Daily Interest Account (DIA) \$ _____

Guaranteed Interest Account (GIA) \$ _____

→ GIA Term (1 - 15 years) _____ (GIA terms > 1 year may not exceed the annuitant's 90th birthday)

→ Compound interest Simple interest - annual Simple interest - monthly

4. COMMISSION REDUCTION FOR RATE ENHANCEMENT

For GIA terms of 10 years or less, you can reduce your commission to increase the interest rate for the client. The interest rate will be increased by the same basis points until the maturity date. (example: A 5 bps reduction will increase the GIA interest rate by 0.05%).

Do you want to request a rate enhancement?

Yes → decrease my commission by _____ basis points (maximum of 20 bps)

No

Please note: Send this completed form to the Annuity Quotes mailbox: annuityquotes@equitable.ca.