



Verification of identification (remote signer)

This form is used when Equitable® requires the identity of an owner or signing officer to be verified.

Name		Contract/Application number
Address (number, street, apt.)		City
Province	Postal code	Date of birth (dd/mm/yyyy)

1. Provide two original identification documents

Each of the documents must be from a different category below (that is, no more than one document from any one of the categories). The documents should be from a Canadian source unless otherwise indicated. The document must not be expired (if it has an expiry date). Each document can be an original; or a photocopy, fax, or scan/electronic image of the original. Please note that a copy of the original document may be preferable over an original depending on the nature of the document. (For example, you should not send an original Marriage Certificate).

Category A (Must include name and address)	Category B (Must include name and date of birth)	Category C (Must include name and account information)
Government issued photo identification (excluding provincial health cards) – different from Category B document	Government issued photo identification (excluding provincial health cards) – different from Category A document	Bank account statement*
Benefits statement: Federal, Provincial, Territorial or Municipal*	Birth Certificate	Loan account statement*
Canada Pension Plan statement*	Marriage Certificate/Divorce documentation	Credit card statement*
Provincial Vehicle Registration	Permanent Resident Card	Letter from bank, trust company or credit union confirming account*
Municipal Property Tax Assessment*	Citizenship Certificate	
Utility bill (e.g. hydro, phone, cable, etc.)*	Insurance company document (home, auto, life, excluding Equitable)*	
Investment account statement (e.g. RRSP, securities account, excluding Equitable)*	Investment account statement (e.g. RRSP, GIC, excluding Equitable)*	
	Travel Visa issued by a foreign government	
	Temporary Driver's Licence (non-photo)	

*Document can't be more than 12 months old.

2. Send the documents to Equitable

By email: Email the documents with this completed form to individualwealth@equitable.ca

By mail: Mail the documents with this completed form to the address below.

Please be aware that the documents will not be returned to you.

Equitable
One Westmount Road North, P.O. Box 1603 Stn. Waterloo
Waterloo ON N2J 4C7

Please note: Equitable cannot ensure the privacy and confidentiality of any information sent through the internet because e-mail may be vulnerable to interception. As a result, Equitable is not responsible for any loss or damages you may incur if your information is intercepted and misused. If you would prefer to submit your information by another means, please contact us at 1-800-668-4095.