

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?

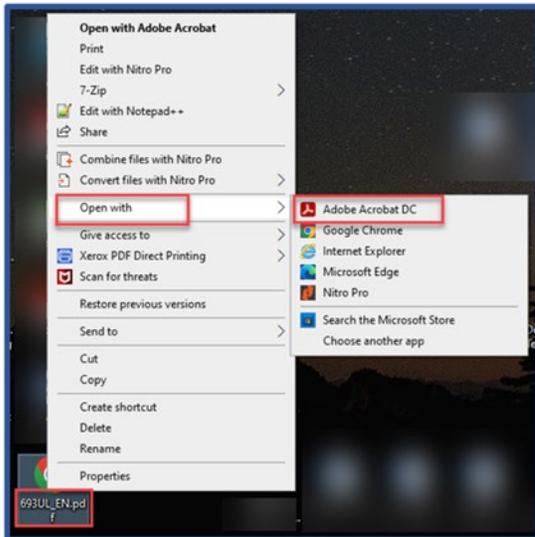
A

- 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 still won't 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.