**Term, Critical Illness and Whole Life Illustration & Quote Requests**

|  |  |
| --- | --- |
| **Policy Number**  | **Policy Owner Name** |
| **Advisor Name** | **Advisor Phone Number** | **Advisor Email Address** |

 **Note**:

* Premium offset and dividend projections cannot be provided on Final Protection Whole Life policies as they are non-par.
* Some requests including quotes for decreases, smoker changes, loans, and surrendered or lapsed policies, as well as some requests for policies beginning with “000”, D2000 or MetLife policies may be subject to review by our Pricing team, which may result in longer handling times.

## Whole Life Illustration Requests Only - *Select and complete the following:*

[ ]  **Inforce Illustration\*/ Dividend Projection**

[ ]  **Premium Offset**

[ ]  **IFA Illustration**

[ ]  **IFA Illustration (with Excel spreadsheet)**

[ ]  **EDO Deposit**

* Enter Custom/G3 amount $

|  |
| --- |
| \*The cash premium will continue for the life of the policy to age100 as default if premium offset is not selected. |

## Whole Life Quote Requests - *Select and complete the following:*

[ ]  **Decrease base coverage amount to** $  on
Insured

[ ]  **Decrease premium amount** **to** $  on Insured

[ ]  **Rider Change** to be on insured  to the amount $

[ ]  **Max EDO Deposit**

**\*\*Single Life: Basic Equimax/Equimax 20-pay-$10,000 minimum face amount\*\***

**\*\*Single Life: Equimax/Equimax 20-pay with Enhancement- $11,000 min face amount\*\***

**\*\*Joint Life: $25,000 total minimum face amount (including any enhancement amount)\*\***

## Term Quote Only - *Select and complete the following:*

[ ]  **Decrease premium** **amount to** $  on Insured

[ ]  **Decrease base coverage amount to** $  on
Insured

[ ]  **Rider Change** to be on to the amount $

## Critical Illness Quote Only - *Select and complete the following:*

[ ]  **Decrease base coverage amount to** $       on Insured

[ ]  **Rider Change** to be on  to the amount $

[ ]  **Change Privilege (post Feb 11 2022)** From **10YRT** to

[ ]  **Change Privilege (post Feb 11 2022)** From **Level age to 75** to

[ ]  **Change Privilege (post Feb 11 2022)** From **Level age to 100** to **20 Pay for Life**.

[ ]  **Change Privilege (pre-Feb 12 2022)** From **10YRT** to

**\*\*Policies Issued prior to Feb 12, 2022: 10 Year Renewable to Age 75: Minimum $25,000. Level to Age 75/100: Minimum $50,000\*\***

**\*\*Policies Issued Feb 12, 2022 or later: Minimum $10,000. ADB is not available as a rider\*\***

## General Changes - *Select and complete the following:*

[ ]  **Reduce Paid Up** (Quote Only)

[ ]  **Rating Change to**  %

[ ]  **Smoker to non-smoker**

Insured Smoker Status

Special Instructions:

**To have request submitted, send request to** **inforcelifemail@equitable.ca**® and TM denote trademarks of The Equitable Life Insurance Company of Canada.