

QUICK REFERENCE GUIDE



Getting started

- Login to EquiNet[®] and select EZcomplete from Online Tools & Information
- Before completing your first application, visit our practice site
- Compatible browsers: We support all versions of Firefox, Chrome, Edge and Safari, as well as the most recent version of Internet Explorer.



Use it for

- Face-to-face or non-face-to-face meetings between advisor and clients
- Individual, joint or business-owned policies



Electronic payment options

- Deposit types include:
 - Online Banking
 - Internal transfer
 - External transfer
 - One-time pre-authorized debit
 - Ongoing pre-authorized debit



Attachments

- EZcomplete tells you what attachments are required
- Take a photo of the document or scan it and save it to your computer
- Click the **Upload Documents** button



Tips for attachments

- Multiple page documents must be scanned to your computer and saved as a single file
- Acceptable file formats: BMP, JPG, JPEG, PNG, GIF, TIF, TIFF, PDF, DOC and DOCX
- No more than 50 files can be uploaded
- Each file cannot exceed 10MB

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Navigation tips

- EZcomplete will time out after 20 minutes of inactivity
- **Next** button automatically saves the screen and moves to the next step
- **Back** button and Navigation bar on the left allow you to move to a previous screen or Step.

Submission process

- Non-face-to-face application requirements
 - Advisors are required to provide the owner with the Pivotal Select™ Contract and Information Folder, and the Pivotal Select Fund Facts document **before** the application is signed.
 - Advisors are also required to provide the owner with a copy of the completed application. These steps should be done outside of EZcomplete.
- System will automatically submit signed application after 30 calendar days if you don't click the submit button.
- When an application is submitted, an email will be issued to you, your MGA office and your client.
- 28 days after your application has been submitted to Equitable Life® it will be deleted from your EZcomplete Dashboard.
- If signatures are missing, system will automatically delete application after 30 calendar days.
- When an application is deleted, your client is notified that the application has been deleted.
- You can check the status of any application, at any time on the EZcomplete Dashboard.

