



Guide to Completing the 693UL

This document will guide you through how to complete the 693UL form. When you access form 693UL from [EquiNet](#) you may receive the following message:

If you are seeing this message, one or all the following reasons may exist:

- *Your browser doesn't support this type of PDF file*
- *You are on a mobile device*
- *You are not using Adobe Acrobat Reader*

How to resolve:

- *Ensure Adobe Acrobat Reader is installed on your computer**
- *Save the PDF file to a specific location on your computer (example: desktop)*
- *Open Adobe Acrobat Reader*
- *Find and open the PDF file from within Adobe Acrobat Reader*

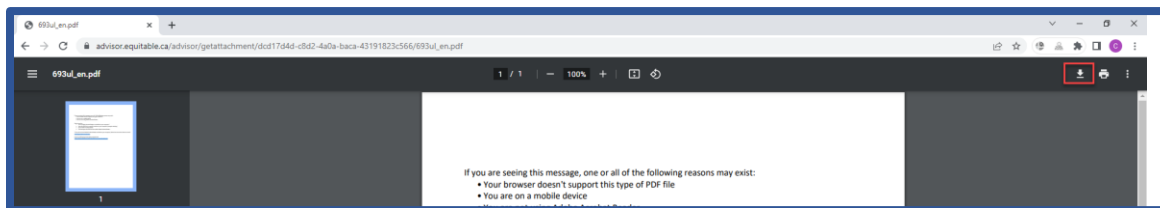
** If you do not have Adobe Acrobat Reader installed on your computer, follow the instructions below to install.*

<https://get.adobe.com/reader>

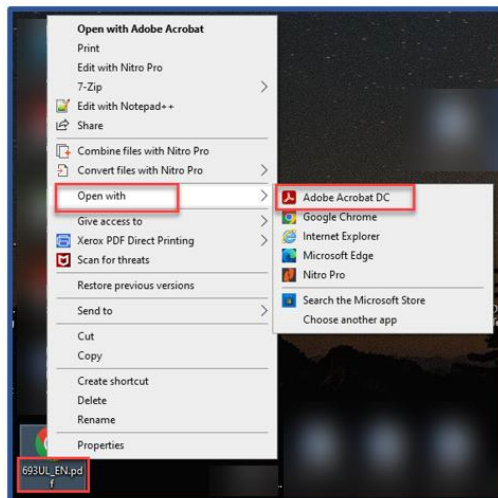
If you are still having issues, please visit this link.

<https://helpx.adobe.com/ca/acrobat/kb/cant-view-pdf-web.html>

If you have downloaded Adobe, click download on the message document (693UL) and save it to your desktop or any location you prefer.



Once you have downloaded the form save it to your desktop and open in Adobe.





Form 693UL will open.

Note: Initially only sections 1&2 will be seen. Selections must be made to have additional sections open on the form. See examples below.

Equitable Life of Canada

Head Office
 One Westmount Road North
 P.O. Box 1403 Stn. Waterloo, Waterloo, Ontario N2J 4C7
 TF 1.800.668.4095 T 519.886.5210 F 519.883.7404
 www.equitable.ca

Reset Form **Print Form**

REALLOCATION AND TRANSFER OF FUNDS - UNIVERSAL LIFE Policy Number

1. Insured's Information

Insured Given Name Middle Initial
 Insured Last Name

2. Product and Request Selection

Is this for a Term conversion? Yes No Term Policy number: _____

Select the proper product of your policy:

Direction 2000 Direction 2000 Plus Equation® Equation Generation® II
 Equation Generation® III Equation Generation® IV Equilife® Equitable Generations™

This request is for:

Future deposits only Only this deposit of \$ _____
 Existing investments only This deposit of \$ _____ and future deposits
 Both existing investments and future deposits This deposit of \$ _____, existing investments and future deposits

Note: Minimum investment required for a Guaranteed Deposit Account is \$500.

Section 1

Begin by entering the policy number and the insureds first and last name.

REALLOCATION AND TRANSFER OF FUNDS - UNIVERSAL LIFE Policy Number

1. Insured's Information

Insured Given Name Middle Initial
 Insured Last Name

Section 2

Make the appropriate selections.

If you are converting a Term product select "Yes", enter the Policy number you would like to convert, and move to the next portion.

If not, select "No", and move to the next portion.

2. Product and Request Selection

Is this for a Term conversion? Yes No Term Policy number: _____

If form 693UL is completed for a term conversion enter the existing policy number



Select the product type you are converting to when converting to another product.

If you selected “No” to converting a term product, select the product you currently have.

2. Product and Request Selection

Is this for a Term conversion? Yes No Term Policy number: _____

Select the proper product of your policy:

<input type="checkbox"/> Direction 2000	<input type="checkbox"/> Direction 2000 Plus	<input type="checkbox"/> Equation®	<input type="checkbox"/> Equation Generation® II
<input type="checkbox"/> Equation Generation® III	<input type="checkbox"/> Equation Generation® IV	<input type="checkbox"/> EquiLife®	<input type="checkbox"/> Equitable Generations™

Select what this request is for.

2. Product and Request Selection

Is this for a Term conversion? Yes No Term Policy number: _____

Select the proper product of your policy:

<input type="checkbox"/> Direction 2000	<input type="checkbox"/> Direction 2000 Plus	<input type="checkbox"/> Equation®	<input type="checkbox"/> Equation Generation® II
<input type="checkbox"/> Equation Generation® III	<input type="checkbox"/> Equation Generation® IV	<input type="checkbox"/> EquiLife®	<input type="checkbox"/> Equitable Generations™

This request is for:

<input type="checkbox"/> Future deposits only	<input type="checkbox"/> Only this deposit of \$ _____
<input type="checkbox"/> Existing investments only	<input type="checkbox"/> This deposit of \$ _____ and future deposits
<input type="checkbox"/> Both existing investments and future deposits	<input type="checkbox"/> This deposit of \$ _____, existing investments and future deposits

Note: Minimum investment required for a Guaranteed Deposit Account is \$500.

In the below example, the request is for a Term conversion. The policy number of the Term policy is entered. The request is to change the policy to Equitable Generations and future deposits only.

Notice once the selections are made, the document populates additional sections to be completed.

2. Product and Request Selection

Is this for a Term conversion? Yes No Term Policy number:

Select the proper product of your policy:

<input type="checkbox"/> Direction 2000	<input type="checkbox"/> Direction 2000 Plus	<input type="checkbox"/> Equation®	<input type="checkbox"/> Equation Generation® II
<input type="checkbox"/> Equation Generation® III	<input type="checkbox"/> Equation Generation® IV	<input type="checkbox"/> EquiLife®	<input checked="" type="checkbox"/> Equitable Generations™

This request is for:

<input checked="" type="checkbox"/> Future deposits only	<input type="checkbox"/> Only this deposit of \$ _____
<input type="checkbox"/> Existing investments only	<input type="checkbox"/> This deposit of \$ _____ and future deposits
<input type="checkbox"/> Both existing investments and future deposits	<input type="checkbox"/> This deposit of \$ _____, existing investments and future deposits

Note: Minimum investment required for a Guaranteed Deposit Account is \$500.

Complete Sections:

- 3. Equitable Generations**
- 5. Agreement**

Section 3

Enter in the Equitable Generations investment options to be selected.

Section 5

Complete the agreement section ensuring all signatures and dates are captured.



In this example, there is no conversion requested. The current policy is Equation Generation III, and the request is to update existing investments.

Notice again, that once selections are made, the document populates additional sections to be completed.

1. Insured's Information

Insured Given Name Middle Initial

Insured Last Name

2. Product and Request Selection

Is this for a Term conversion? Yes No Term Policy number: _____

Select the proper product of your policy:

Direction 2000
 Direction 2000 Plus
 Equation®
 Equation Generation® II
 Equation Generation® III
 Equation Generation® IV
 EquiLife®
 Equitable Generations™

This request is for:

Future deposits only
 Only this deposit of \$ _____
 Existing investments only
 This deposit of \$ _____ and future deposits
 Both existing investments and future deposits
 This deposit of \$ _____, existing investments and future deposits

Note: Minimum investment required for a Guaranteed Deposit Account is \$500.

Complete Sections:

4. Existing Investments

5. Agreement

Section 4

Complete the Existing Investments.

4. Existing Investments
Note: An Outstanding Policy Loan May Restrict GDA or DIA transfers

Transfer 1 - I request the following transfers: **Add Transfer**

	From	To	%
\$ <input type="text" value=""/> % <input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
Add Row			

Section 5

Complete the agreement section ensuring all signatures and dates are captured.