

MGA Login Process

MGA staff, Regional Branch Managers, Supervisors or advisors' assistants can follow this process to view applications that have been started or submitted.

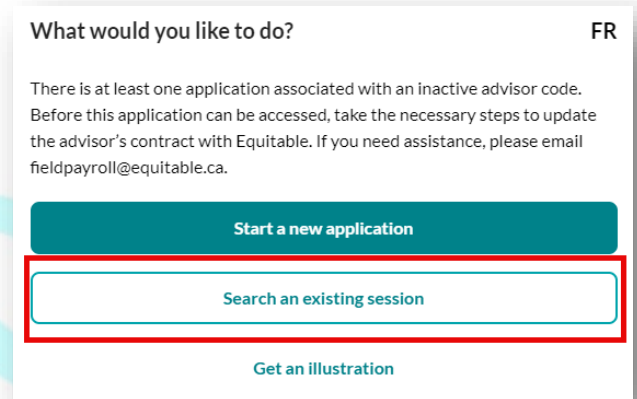
Log into EquiNet®

- Then select EZcomplete.
- You will be able to access applications for any Advisor Code(s) associated with your EquiNet ID.

Find an application in EZcomplete

1. Once in EZcomplete, you can:

- Start a new application using your own Advisor Code, or
- Find an existing application. Select this option.



What would you like to do? FR

There is at least one application associated with an inactive advisor code. Before this application can be accessed, take the necessary steps to update the advisor's contract with Equitable. If you need assistance, please email fieldpayroll@equitable.ca.

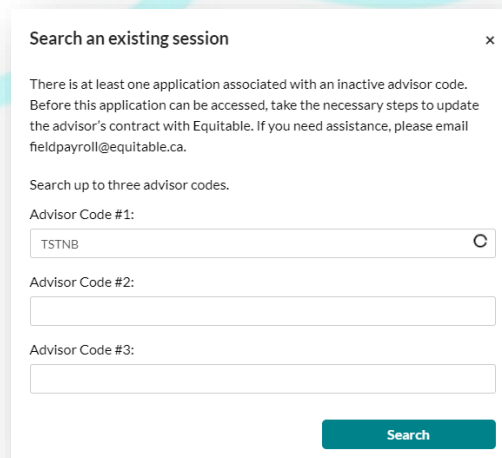
Start a new application

Search an existing session

Get an illustration

2. The Advisor Codes screen will appear.

- You can enter up to 3 Advisor Codes.
- Click Find Applications.



Search an existing session x

There is at least one application associated with an inactive advisor code. Before this application can be accessed, take the necessary steps to update the advisor's contract with Equitable. If you need assistance, please email fieldpayroll@equitable.ca.

Search up to three advisor codes.

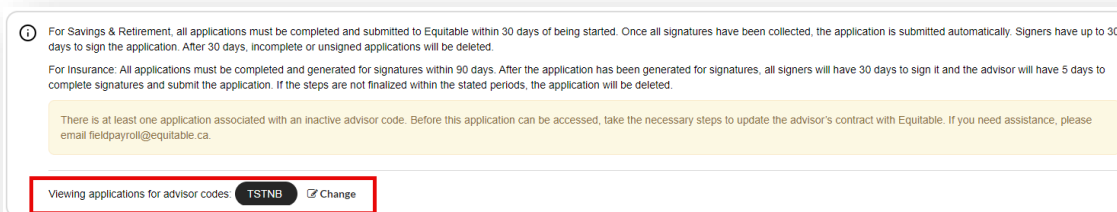
Advisor Code #1:

Advisor Code #2:

Advisor Code #3:

Search

3. You'll be taken to the Dashboard where you can view all applications in process or submitted by the advisor(s).



For Savings & Retirement, all applications must be completed and submitted to Equitable within 30 days of being started. Once all signatures have been collected, the application is submitted automatically. Signers have up to 30 days to sign the application. After 30 days, incomplete or unsigned applications will be deleted.

For Insurance: All applications must be completed and generated for signatures within 90 days. After the application has been generated for signatures, all signers will have 30 days to sign it and the advisor will have 5 days to complete signatures and submit the application. If the steps are not finalized within the stated periods, the application will be deleted.

There is at least one application associated with an inactive advisor code. Before this application can be accessed, take the necessary steps to update the advisor's contract with Equitable. If you need assistance, please email fieldpayroll@equitable.ca.

Viewing applications for advisor codes: **TSTNB** Change

Review an application prior to submission

If the application was saved without signatures:

- You can review and edit the application input screens.

If the application was saved with signatures:

- Once signatures are collected, all input screens are locked and cannot be edited.
- You can view the application and documents by clicking Download signed application on the Step 6 – Signatures screen.

Application Summary

If the Health Information has not been completed in step 3 and is required, Underwriting will request the necessary information upon review of the file.

Signers

You have gathered signatures from 2 of the 2 signers.

100%

- EquimaxSeven NovinsoftAPI
- Siddhartha Pal

[Download signed application](#)
[Download signed illustration](#)
[Download signed additional client information \(form 1027\)](#)

Application Generated for Signatures November 6, 3:19 PM

Review an application after submission

From the Dashboard, you can view the application by clicking Submitted.

Application
No. EA5062584921

Client name
[Hubie ROIXSc Mooby WsANCE](#)
[Ruby xpFHno Mooby QQEYUI](#)

Created November 21, 2024, 3:17 PM

[Clone EA5062584921](#)

Whole Life - Joint First To Die
\$4,500,000

Advisor
New Business Testing - MGA (TSTNB)

Submitted

Submitted on November 21, 2024, 3:48 PM

[View](#)

- Click Download to view the documents.

Application Summary

Application Documents

Document Type	File
Signed Application	Download
Signed Illustration	Download
Initial Payment	Download
Advisor Report	Download

Supporting Documents

Document Type	Associated With	File
Business Information (Form 594)	All	Download
Additional/Updated Client Information (Form 1027)	All	Download
Beneficiary Change Request	All	Download

[Return to Dashboard](#)

August 8, 2024

Claims

Chantal Peats