



Contact us at [EquitableLifeMarketing@equitable.ca](mailto:EquitableLifeMarketing@equitable.ca)

[version française](#)



**Protecting your bundle of joy.**  
(Bubble wrap not required!)

**Works for me.®**  
ideas to simplify your life™

[Learn more](#)

Buying insurance for a child is not only an important step for your clients' financial plan, but also their child's future financial security. Buying when a child is young and healthy is more affordable. Plus, clients may be able to use the Canada Child Benefit (CCB) to help offset premium costs. Check out this [Works for me® article](#) and feel free to share it with your clients.

## Illustration software update

We've added some exciting enhancements to the latest release of our Equitable Sales Illustrations® software. Here are a few highlights:

### **New! Illustrate loan interest repayment**

With the Preferred Retirement Solution®, you can now illustrate a collateral loan in which the interest is repaid each year.

### **New! Illustrate preferred concepts with riders**

You can now illustrate Preferred Estate Transfer® and Preferred Retirement Solution® concepts including riders.

### **New! Increased maximum face amount for Equimax®**

Illustrate up to \$20 million for Equimax Estate Builder® and Equimax Wealth Accumulator®.

These new features are incorporated into version 2018-1 of the Equitable Sales Illustrations software. Released February 20<sup>th</sup>, your software should update automatically. New user? [Download Equitable Sales Illustrations.](#)

## LIMRA Policyowner Satisfaction Survey

Equitable Life® is participating in the LIMRA Customer Experience Benchmarking Program. Randomly selected policyowners will receive a LIMRA survey asking them to rank their experience during the shopping and purchase process. LIMRA will provide Equitable Life with a summary of the results, key findings and recommendations to help us improve our ongoing service. [Find out more.](#)



## New! Interactive UL investor profile questionnaire

We've just made it easier to guide your clients' investment choices. Our new [universal life investor profile questionnaire](#) will assess your clients' comfort with risk and provide investment opportunities you can review with your client to suit their unique situation. This fillable PDF calculates their score automatically - no adding necessary! Once you download the file, you do not require internet access to use it. Reuse it as many times as you want by simply saving it with a new filename each time. There's also no need to print it but, if you do, we've optimized the layout to save ink. Download the new and improved [1190 investor profile questionnaire](#) now.

## Equitable Life of Canada posts record financial results for 2017

Equitable Life had an outstanding year in 2017 surpassing previous records on almost all financial fronts. [Find out more.](#)

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