

Savings & Retirement Supply Request Form

Quantity	Maximum	Form #	Pivotal Select Segregated Funds	Current version
	100	1383	Pivotal Select Application (TFSA)	2019/04/01
	100	1384	Pivotal Select Application (Reg/Non-Reg)	2019/04/01
	100	1366	Pivotal Select Fund Facts	2019/04/01
	100	1403	Pivotal Select Contract and Information Folder	2018/02/28
	100	1112	Segregated Funds and Estate Planning	2017/07/31
	100	1165	Pivotal Select Investor Profile Questionnaire	2018/09/05
	100	1385	Pivotal Select Product at a Glance	2019/03/19
	100	1386	Pivotal Select Estate Class Brochure	2017/05/29
	100	1387	Pivotal Select Investment Class Brochure	2017/05/29
	25	1405	Pivotal Select Advisor Guide	2018/03/29
	100	1547	Protection Class (Advisor piece)	2019/06/05
	100	1548	Protection Class Client Brochure	2015/10/01
	100	1551	Pivotal Select Guarantee Fees	2019/04/01
	100	1611	Growing your guarantees	2019/03/19
	100	1657	Accelerate Your Savings - Automatic Payment Increase Option	2016/10/18
	100	1675	Insights into Non-Registered Taxation	2016/12/12
	100	1718	Pivotal Select Investment Class (Advisor piece)	2017/07/25
	100	1719	Pivotal Select Estate Class (Advisor piece)	2017/07/25
	100	1756	Pivotal Select Preferred Pricing (Client piece)	2018/03/23
	100	1759	Pivotal Select Preferred Pricing FAQ (Advisor piece)	2018/04/12
	100	1797	Understanding Your Investor Profile	2019/02/19

Quantity	Maximum	Form #	Payout Annuity	Current version
	100	355	Payout Annuity Application	2017/05/29
	100	1244	Payout Annuities Client Brochure	2015/03/10
	100	1369	Payout Annuities Product at a Glance	2015/03/10

Quantity	Maximum	Form #	Guaranteed Interest Account	Current version
	100	796	GIA TFSA Application	2019/04/01
	100	799	GIA Application (Non-Reg, RRSP, RRIF, LIF)	2019/04/01
	100	1049	GIA Client Brochure	2014/11/27
	100	1116	GIA Product Facts	2015/05/12
	100	1137	Guaranteed Investments - Are all created equal?	2017/05/01
	100	1655	GDA Auto-Laddering	2016/10/13
	100	1790	GIA Contract (Replaces Form #797 and #798)	2019/03/28

Quantity	Maximum	Form #	Savings & Retirement Materials	Current version
	100	1404	Product Comparison Guide	2017/05/29
	50	1514	Gradual Inheritance Strategy	2015/01/01
	100	1612	Online Banking & Client Access (client piece)	2016/04/10
	100	1613	Online Banking (advisor piece)	2016/04/10
	50	1618	The Equitable Life Investment Advantage	2016/05/18
	100	1638	Equitable Life's Competitive Advantage	2016/08/25
	100	1690	Converting Your Savings into Retirement Income	2018/10/04

Quantity	Maximum	Form #	RRSP & TFSA Materials	Current version
	100	1276	Tax Free Savings Account brochure	2019/03/12
	100	1352	RRSPs - It's Time	2015/11/26
	100	1353	Choosing the right account type	2019/07/08
	100	1354	RRSP Loans – Less Tax, Better Retirement	2018/05/22
	100	1355	Benefits of RRSPs	2013/12/16
	100	1356	RRSP vs. Mortgage	2013/12/16
	100	1357	Are you saving enough for retirement?	2012/08/10
	100	1583	Make your money work for you!	2019/01/14
	100	1630	Tax-free money does exist, if you know where to look	2019/07/08
	100	21SR	Work Hard, Play Hard, Save Hard flyer	2013/12/13
	5	20SR	RRSP Poster	2013/12/13

Advisors: Please request supplies from your MGA.

Please complete this form. Once complete, attach the form to an email and send to supply@equitable.ca

MGAs: You may also fax to 519.883.7424.

Note: Form numbers in **red** are required point of sale documents.

Name:
Email address:
Phone Number:
Shipping address:
Agent / MGA code: