

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 | 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: |