

# Online banking makes saving simple.

**Did you know your clients can make additional deposits to their Equitable Life® savings plan through their financial institution's online banking service?**

**As an advisor, you'll love when your clients make deposits using online banking because:**

- You don't need to collect a cheque
- You can skip the hassle and cost involved in mailing a cheque
- You get paid the same way as you normally would
- You don't need to enter a trade ticket through FundSERV
- Deposits are applied based on the investment direction on file

## **Getting set up:**

Once your client has logged into their financial institution's online banking service, they will select the option to add a new bill/payee, and search for "Equitable Life Savings Plan". When they are asked for an account number they will input their Equitable Life savings plan policy number.

**Your clients will love the convenience of making deposits through online banking, and you'll love making it easy for them to save for their financial goals.**

Deposits can be made to non-registered accounts, Tax-Free Savings Accounts (TFSA), and Registered Retirement Savings Plans (RRSPs). The minimum deposit is \$50 per fund and \$500 per Guaranteed Deposit Account (GDA). We do not guarantee that every bank will allow payments to "Equitable Life Savings Plan" within their online banking service.

®Denotes a trademark of The Equitable Life Insurance Company of Canada.  
FOR ADVISOR USE ONLY



1619/2016/04/101