



# Equitable Bank CSV FLEX Corporate Line of Credit

## Corporate Application Checklist

- Each required document must be submitted as a separate PDF
- Only wet signatures or electronic signatures with a digital summary are accepted
- Failure to submit the required completed documents will result in a processing delay of 5-10 business days
- Pictures/Screenshots will not be accepted

- Whole-life Policy Summary from a partnered insurer (dated within 30 days of submission of application)
- Inforce/Sales illustration of the applicable policy premium paid annually (dated within 30 days of submission of application)
- CSV FLEX Corporate Application Form** (Completed and signed)
- Certificate of Incumbency** (Completed and signed)
- Personal Information Collection Form**: 1 for each Signing Officer as noted on Certificate of Incumbency, up to a maximum of 3 (Completed and signed)
- Articles of Incorporation
- Two pieces of photo identification (Clear and legible)
  - Driver's license (Preferred)
  - Passport (Preferred)
  - Contact your advisor for other acceptable forms of identification if needed