



Equitable Bank Immediate Financing Agreement (IFA)

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 (Adobe signatures not 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)

IFA Corporate Application Form (Completed and signed)

Guarantor Application (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

- Required supporting income, net worth documentation, and proof of liquid assets as noted below for the **Corporation**
 - For investment accounts: quarterly report (printable statement)
 - For bank accounts: 3 months' statement (printable statement)
 - Most recent 2 years of accountant-prepared financial statements (or most recent 2 years of T2 slips)

- Required supporting income, net worth documentation, and proof of liquid assets as noted below for the **Guarantor**
 - For investment accounts: quarterly report (printable statement)
 - For bank accounts: 3 months' statement (printable statement)
 - Most recent 2 years' T1 or T4
 - Most recent 2 years' Notice of Assessment

- 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