

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
- 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