

Equitable Bank CSV FLEX Personal Line of Credit

Personal 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 (dated within 30 days of submission of application)
- CSV FLEX Personal Application Form** (Completed and signed)
- 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