

Equitable Bank CSV MAX 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
- 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 (dated within 30 days of submission of application)

CSV MAX Personal Application Form (Completed and signed)

One of the following supporting income/net worth documents, and proof of liquid assets:

Please refer to Schedule A of the CSV MAX Personal Application Form for more information on required supporting income documentation

- For bank accounts: 3 months' statement (printable statement)
- For investment accounts: quarterly report (printable statement)
- Most recent year's T1 or T4
- Most recent year's 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