



Equitable Bank Immediate Financing Agreement (IFA)

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 when policy is in place)

Inforce/Sales illustration of the applicable policy premium paid annually (dated within 30 days of submission of application)

IFA Personal Application Form (Completed and signed)

Required supporting income, net worth documentation, and proof of liquid assets as noted below

- For bank accounts: 3 months' statement (printable statement)
- For investment accounts: quarterly report (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