

I, the undersigned solicitor or notary, attest that (i) I understand and accept that I am acting as an agent on behalf of Equitable Bank for the purpose of ascertaining the identity of the individual listed below; (ii) I am currently in good standing and entitled to practice law without any restrictions; (iii) I have personally met with the individual; and (iv) I have examined **one valid and current** original identification document from the list in Appendix A which has been verified by me in accordance with the *Proceeds of Crime (Money Laundering) and Terrorist Financing Regulations* of Canada. I attach a photocopy of both sides of the identification document hereto, and have recorded below the following information for the individual.

Details about the Power of Attorney/Estate Trustee:

LAST NAME		FIRST NAME		SECOND NAME		DATE OF BIRTH MMM DD YYYY	
HOME ADDRESS				CITY, PROVINCE/STATE		COUNTRY	
IDENTIFICATION TYPE	IDENTIFICATION NUMBER			PROVINCE/STATE & COUNTRY OF ISSUANCE		EXPIRY DATE, IF AVAILABLE	
OCCUPATION ¹ (include title and industry)							
PRIVACY CONSENT: You agree that Equitable Bank, or any insurer engaged by it, may collect, use and disclose your information in accordance with the terms of its Privacy Agreement and federal legislation, including providing information to third parties. A copy of Equitable Bank's Privacy Agreement has been or will be provided to you and is available on Equitable Bank's website at www.equitablebank.ca and in its offices. You may also request a copy of the Privacy Agreement by calling 1-866-407-0004.							
POWER OF ATTORNEY/ESTATE TRUSTEE SIGNATURE							

Signature of Solicitor/Quebec notary (acting as an Agent): _____

Name (please print): _____ **Date:** _____

¹ Vague descriptions such as "Business-for-Self", "self-employed", "consultant", "investor", "business owner", "businessman", "entrepreneur" or "Signing Officer" are **not acceptable**. The occupation must clearly reflect the nature of the work and the industry in which it is performed.

Obtain one piece of **government-issued photo identification, federal, provincial, or territorial**, from the list below.

- (1) Driver's Licence, including Enhanced Driver's License where issued by participating provinces
- (2) Passportⁱ
- (3) Canadian Citizenship Card (**not Canadian Citizenship Certificate**) issued prior to 2012
- (4) Permanent Resident Card
- (5) Possession and Acquisition License (PAL) — issued by the Canadian Federal government under the *Firearms Act*
- (6) Armed Forces ID issued by the Government of Canada – for current enlisted personnel only; not civilian or reserve
- (7) FAST Card
- (8) NEXUS Card
- (9) Provincial Health Card, but only if it contains a photograph and is not prohibited by provincial legislation*
- (10) Provincial or territorial identification card issued by any of the following:
 - the Ministry of Transportation of Ontario (Ontario Photo Card);
 - the Insurance Corporation of British Columbia;
 - Alberta Registries;
 - Saskatchewan Government Insurance;
 - Manitoba Public Insurance;
 - the Department of Service Nova Scotia and Municipal Relations;
 - the Department of Transportation and Public Works of the Province of Prince Edward Island;
 - Service New Brunswick; or
 - the Department of Government Services and Lands of the Province of Newfoundland and Labrador

Notes:

- i) The place of issuance for a Passport is deemed to be the country/jurisdiction which originally issued the document.
- ii) We can accept an individual's provincial health card, but only if it is not prohibited by provincial legislation.
- iii) All identification documents must be current to be acceptable.
- iv) Currently Ontario, Manitoba, Nova Scotia and P.E.I. prohibit use of a health card for identification purposes. *In Quebec, we cannot request to see a client's health card, but we may accept it if the client wants to use it for identification purposes.
- v) Valid foreign ID, if equivalent to an acceptable type of Canadian identification document, is acceptable.
- vi) Where the individual is not physically present in Canada, a third party (e.g., lawyer, notary public, commissioner of oaths or similar person) who is attesting to the individual's identity on our behalf has to be properly instructed in writing to act as our agent and has to complete and sign the Identification Verification Form. In addition, the lawyer, notary public, commissioner of oaths or similar person's good standing must be confirmed.