

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)

Where the policy CSV is greater than or equal to \$110,000 you will need to provide one of the following:

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

