



Equitable Bank CSV MAX Line of Credit

Personal Application Checklist

- A Policy Summary from a partnered insurer (dated within 30 days of submission of application)
 - An Inforce Illustration of the applicable policy (dated within 30 days of submission of application)
 - CSV MAX Personal Application Form** (completed & signed)
 - Supporting Income and Net Worth Documentation (as applicable and as further set out in Schedule A of application)
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Corporate Application Checklist

- A Policy Summary from a partnered insurer (dated within 30 days of submission of application)
- An Inforce Illustration of the applicable policy (dated within 30 days of submission of application)
- Personal Information Form**: 1 for each Signing Officer – up to a maximum of 3 (completed & signed)
- Certificate of Incumbency** (completed & signed)
- Copy of Articles of Incorporation
- CSV MAX Corporate Application Form** (completed & signed)

STANDARD

- Supporting Corporate Income and Net Worth Documentation (as applicable and as further set out in Schedule A of application)

WITH GUARANTOR

- Guarantor Application** (completed & signed)
- Supporting Guarantor and Corporate Income and Net Worth Documentation (as applicable and as further set out in Schedule A of applications)