



Equiton makes it quick and easy for Advisors to qualify their clients in our Funds. It takes less than 5 minutes to fill out the requisite paperwork. Enter your trade into your system and follow the instructions below to complete your trade.

Less Than
5 mins
To Complete
All Paperwork



Subscription Agreement

For non-eligible investors, use the Eligible Investor Subscription Agreement and complete pages **2, 20, 25 and 27**.



2 mins

Page 2 Complete all relevant fields.

Frequently asked questions about this page:

Full Legal Name



If the investment is joint, both full names are required here and all subsequent fields in this section should have the information for both individuals. You must also specify if the investment is **Joint with Right of Survivorship (JTWROS)** OR **Tenants in Common (TIC)**.

Date of Execution



Date the document is signed.

Is the Subscriber a registrant



“Registrant” = Financial Advisor or licensed individual making the investment.

Is the Subscriber an insider of the Issuer



“Insider of the Issuer” = works for Equiton.

If the Subscriber is signing as an agent of the principal



“Agent of the principal” = Power of Attorney, Portfolio Manager etc.

Distribution option



“Option selection” = needs to match the selection in your system.

Register the Trust Units/ Deliver the Trust Units



Trust information of where the funds are being held, if applicable.



30 sec

Page 20 Fill in relevant fields, sign and date.

Field: “I am paying \$” - total consideration = purchase fees plus any fees.



30 sec

Page 25

Initial the box in Section D.



30 sec

Page 27

Initial in boxes based on investor category.

Section 1.D: Fill in the purchase amount then initial the box.

Section 2: To be completed if registrant received advice from a Portfolio Manager, investment dealer or Exempt Market Dealer.
