HSBC

1090159-E_2008-05

HSBC InvestDirect

Application for Pre-Authorized Contribution Plan (PAC) / Systematic Investment Plan (SIP)

1. Provide the account number of the HSBC InvestDirect account you wish to set up.

2. Select your plan

☐ **PAC – Pre-Authorized Contribution** (automated transfer of funds *into* your HSBC InvestDirect account from your Bank account)

☐ **SIP – Systematic Investment Plan** (automated Mutual Fund Purchase)

Is this a new plan or a change to existing plan: ☐ New ☐ Change to existing instructions

3. To set-up automated transfer of funds from your Bank account to your HSBC InvestDirect account, provide banking information.

I wish to transfer: $ _____ (CDN) Is this a spousal contribution? (For RSP accounts only) ☐ Yes ☐ No	Start date: _____ MM/DD/YYYY	Frequency: ☐ 1st of every month ☐ 15th of every month ☐ Bi-weekly (1st and 15th of every month)
From: ☐ HSBC Bank Account ☐ Other Bank Account	Provide full details: Institution # _____ Transit # _____ Account # _____	

- The Bank account that HSBC InvestDirect is authorized to draw upon is indicated above. The undersigned(s) undertake to inform HSBC InvestDirect, in writing, of any change in the account information provided in this authorization prior to the next due date of the funds transfer.
- If the Bank account is not currently linked to your HSBC InvestDirect account, please **attach a void cheque**. (The Bank account and the HSBC InvestDirect account must be in the same name(s).)
- Plans are available in CAD for CAD currency accounts only.
- Bank must be a member of the Canadian Payments Association.

4. Provide details of the mutual fund you wish to invest in. *(Minimum $100 per fund.)*

Fund Name	Fund Symbol	Amount $

Total Amount $ _____

- Start Date and Frequency of the mutual fund investments will follow those provided in the Banking Information Section.
- Please ensure to submit your completed application 10 calendar days prior to the start date of your plan. (Plans will start on the stated day of the next rotation if there is insufficient time to process).

5. Signatures

(By signing the below, you confirm you understand, accept and agree to participate in the pre-authorized transfers and purchases described above, and agree to waive the pre-notifications required under the Canadian Payment Association Rules. By signing the below you agree you have received, read and agree with the Monthly Contribution Plan Agreement contained in the Client Terms and Conditions, which is incorporated by reference into this form.)

Client Signature	Print Name	Date
Client Signature	Print Name	Date