



## PERSONAL INFORMATION CONSENT

**To: HSBC InvestDirect**

**Date:** \_\_\_\_\_

**Please return the following Personal Information Consent Form.**

### **Personal Information**

You, HSBC Bank Canada, its subsidiaries and affiliates may use my personal information (including financially-related information) and disclose it to each other when it is necessary in order to serve me as a customer, to meet legal and regulatory requirements, and for internal audit, statistical and record-keeping purposes. I understand that you are a wholly owned, indirectly held subsidiary of HSBC Bank Canada.

With my consent, you may collect, use, and share my personal information to identify and inform me of HSBC products or services that may be of interest to me. You may also share my personal information with HSBC Bank Canada, its subsidiaries and affiliates in order to provide me with better service.

### **Credit and Financial Information**

In order to evaluate my eligibility for services or products that I request, you, HSBC Bank Canada, its subsidiaries and affiliates may collect credit and other personal information about me from third parties, including credit bureaus, credit grantors and those income sources and personal references that I identify to you, to for the purpose of evaluating my eligibility for services or products that I request. You, HSBC Bank Canada, its subsidiaries and affiliates may also disclose credit and other financial information about me to credit bureaus, credit insurers, other credit grantors and each other. In particular, you and HSBC Bank Canada may exchange credit and other financially related information about me in order to assess and monitor my credit worthiness.

I may refuse this consent; however, I recognize that you will have the right to cancel or withhold products or services for which credit-worthiness is relevant.

### **Social Insurance Number (SIN)**

The government requires that you ask me for my SIN if any of my accounts earn interest that must be reported for tax purposes, or if I purchase certain products like a retirement savings plan or retirement income fund. I am not required to provide you with my SIN for any other purpose. With my consent, you, HSBC Bank Canada, its subsidiaries and affiliates may collect, use and share my SIN to help ensure accuracy on credit checks and for statistical and record-keeping purposes.

**My Privacy Choices**

- 1. You may share my personal information with HSBC Bank Canada, its subsidiaries and affiliates in order to provide me with better service. Yes   
No
- 2. You may collect and use my personal information to identify and inform me of HSBC products or services that may be of interest to me. Yes   
No
- 3. You, HSBC Bank Canada, its subsidiaries and affiliates may collect, use and share my social insurance number for statistical and record-keeping purposes. Yes   
No

I may vary these choices at any time by contacting an HSBC InvestDirect office. My choices will not affect my eligibility for your products or services.

It is the express wish of the parties that this agreement and any related documents be drawn up and executed in English. Les parties conviennent que la présente convention et tous les documents s’y rattachant soient rédigés et signés en anglais.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Signature of Co-Applicant

\_\_\_\_\_  
Name of Applicant (please print)

\_\_\_\_\_  
Name of Co-Applicant (please print)

HSBC InvestDirect Account No(s):  
  
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