



HSBC World Selection® 2022 Summer Offer (the Bonus Offer)

HSBC Investment Funds (Canada) Inc. (**HIFC, we or us**) is offering a bonus for investments into HSBC World Selection Portfolio (**WSP**) or HSBC World Selection Diversified Funds (**WSDF**) held in a new or existing Qualifying Account (defined below).

The Bonus Offer can have two components – the Initial Investment Bonus and if applicable, an Ongoing Investment Bonus (together or separately, the **Bonus Amount**). This offer begins on June 6, 2022 and ends on August 13, 2022.

If you want to participate in the Bonus Offer, please read the Terms and Conditions carefully before completing the signature section below. Thank you for investing with us.

Agreement and Signature

By signing this form:

1. You confirm you want to participate in the Bonus Offer;
2. You confirm you have received, read, understand and agree to these Terms and Conditions;
3. If we determine you are eligible to receive the Bonus Amount (defined below), you instruct and authorize us to invest the Bonus Amount following the applicable Terms and Conditions in the section called “Terms of Bonus Amount”.
4. If you are participating in this Bonus Offer by investing in WSDF, we are required by securities regulations to deliver to you the Fund Facts document for the HSBC Canadian Money Market Fund (Investor Series or Premium Series, as applicable) if:
 - you don’t currently hold the same series of the fund, or
 - you currently hold the fund but you haven’t received the current Fund Facts for that series of the fund.

If this applies to you, you confirm that we have delivered to you the applicable Fund Facts document(s), by email, in person, or online. You further confirm you have received, read and understand each Fund Facts document(s) delivered to you.

Sole Qualifying Account Holder:

Customer Name (printed)

Customer Signature

Date

Joint Qualifying Account Holders:

Customer Name (printed)

Customer Signature

Date

Customer Name (printed)

Customer Signature

Date

Non-Personal Qualifying Accounts (Business, Partnership, Trust):

Name of Qualifying Account Holder	
Authorized Signatory	Date
Authorized Signatory	Date

Terms and Conditions of the Bonus Offer

1. Qualifying Account means any of the following HIFC accounts: RRSP account (including spousal RRSP), RRIF account, TFSA account (**Registered Accounts**), or sole or joint non-registered and Non-Personal account types that invest only in HSBC World Selection Portfolio (**WSP**) or HSBC World Selection Diversified Funds (**WSDF**).

- RESP accounts and locked-in registered accounts do not qualify for this Bonus Offer.

2. INITIAL INVESTMENT BONUS DETAILS

The Initial Investment Bonus Amount for Qualifying Assets is:

Bonus Amount	Qualifying Assets
\$300	\$15,000 to \$49,999.99
\$600	\$50,000 to \$99,999.99
\$1,200	\$100,000 or more

To qualify for the Initial Investment Bonus, you must:

- A. Transfer in and invest at least \$15,000 or more (**Qualifying Assets**)
- From an HSBC Bank account to your Qualifying Account(s) no later than August 13, 2022.
 - From an external financial institution to your Qualifying Account(s) no later than September 16, 2022.
 - For Registered Accounts and Non-Personal Qualifying Accounts, each account must meet the minimum Qualifying Assets and each is able to qualify for the Bonus Offer.
 - For non-registered accounts, each account must meet the minimum Qualifying Assets and you may invest in multiple non-registered accounts. The Qualifying Assets will be calculated by combining the value of the investable assets transferred into those account(s). Note that the accounts can be sole or joint accounts so long as the recipient of the bonus offer is named in the accounts.
 - Qualifying Assets do not include: 1) any regular contributions made under a HIFC Pre-Authorized Contribution Plan (**PAC Plan**) existing on the date you sign this form; or 2) in-kind transfers of HSBC Mutual Funds from any HSBC InvestDirect* accounts.
- B. Maintain the Qualifying Assets in the Account until August 11, 2023.
- If, before August 11, 2023, you withdraw, deregister, or transfer assets out from your Qualifying Account(s), these amounts will be subtracted from the value of your Qualifying Assets and if reduced below the minimum investment eligibility of \$15,000, you will not qualify for the Initial Investment Bonus.

* HSBC InvestDirect is a division of HSBC Securities (Canada) Inc., a wholly owned subsidiary of, but separate entity from, HSBC Bank Canada. Member – Canadian Investor Protection Fund. HSBC InvestDirect does not provide investment advice or recommendations regarding any investment decisions or securities transactions.

3. ONGOING INVESTMENT BONUS DETAILS:

The Ongoing Investment Bonus Amount is **\$100**.

To qualify for the Ongoing Investment Bonus, you must qualify for the Initial Investment Bonus and

- A. Set up a PAC Plan or increase your PAC amount for the same Qualifying Account:
 - For investments in WSP, a monthly lump sum contribution of at least \$250.
 - For investments in WSDF, a total regular monthly contribution amount of at least \$150. This can be a lump sum or smaller payments throughout the month.
- B. Complete your first PAC by August 22, 2022 and continue the monthly contributions until August 11, 2023 or later.
 - If you cancel a PAC Plan for your Qualifying Account between April 6, 2022 and August 11, 2023 (inclusive), you do not qualify for the Ongoing Investment Bonus.

4. Terms of Bonus Amount:

If you meet all these Terms and Conditions, then on or before August 11, 2023, we will invest the Bonus Amount, as applicable, into your Qualifying Account in the following ways:

- For investments in WSDF, we will use the Bonus Amount to purchase units of the HSBC Canadian Money Market Fund (Investor Series or Premium Series, as appropriate);
- For investments in WSP, we will use the Bonus Amount invest to in your Qualifying Account in accordance with the model portfolio for your WSP account.

5. Identifying the Qualifying Account that Gets the Bonus Amount:

- We will assess each Registered Qualifying Account and each Non-Personal Qualifying Account separately and we will pay the Bonus Amount into each one of these Qualifying Accounts that meets these Terms and Condition on an individual basis.
- You can participate in this Bonus Offer for one or more non-registered Qualifying Accounts; however, we will assess these accounts as a group. If you invest in only one non-registered Qualifying Account and meet these Terms and Conditions, we will pay the Bonus Amount into that account. If you used multiple sole non-registered accounts, we will choose which account gets the bonus. If those accounts also include one or more joint accounts, we will choose one joint account to receive the Bonus Amount. Only one Bonus Amount is paid related to all non-registered accounts.
- The maximum bonus per Qualifying Account for the Initial Investment Bonus and Ongoing Investment Bonus is \$1,300.

6. Bonus Amount is the amount of money you will receive in Canadian dollars from participating in the Bonus Offer if you follow all of these Terms and Conditions. We will pay you the Bonus Amount by making investments in the applicable account as explained in these Terms and Conditions.

7. You must be the age of majority in the province or territory where you reside in order to participate in the Bonus Offer.

8. All amounts are in Canadian dollars unless otherwise indicated.

9. Standard Suitability and Account Terms: All investments in your Qualifying Account(s) are subject to a standard suitability assessment and the applicable account terms and conditions. These Terms and Conditions do not in any way change the HIFC account terms and conditions. If there is an inconsistency, then the HIFC account terms and conditions take priority.

For a new WSP account, you must invest the minimum investment requirement for WSP of \$50,000. You can use that initial investment towards the Qualifying Amount under this Bonus Offer.

10. We can change, extend or cancel this Bonus Offer and the Terms and Conditions at any time without giving you advance notice. In the event of a cancellation, only fully completed and processed Bonus Offer forms with investment amounts transferred to HIFC within 31 calendar days from the cancellation date will be able to participate in the Bonus Offer.

11. **This offer cannot be combined with any other HIFC offer.**
12. **We will reimburse a maximum of \$200 in transfer fees** (the **Reimbursement Amount**) incurred to move Qualifying Assets from another financial institution to a Qualifying Account. You will need to provide us with a statement confirming the amount of transfer fees and a Request for Reimbursement of Transfer-out Fee form. You can get this form from an HSBC Mutual Funds Advisor.
The Reimbursement Amount will be paid in units of mutual funds as follows:
 - For investments in WSDF, we will purchase units of the fund in accordance with your instructions; and
 - For WSP accounts, we will contribute the Reimbursement Amount to your Qualifying Account and it will be invested in accordance with your model portfolio.
 The Reimbursement Amount must be paid to the Qualifying Account used for participation in this Bonus Offer.
13. **Neither HIFC, HSBC nor any member of the HSBC Group provides tax advice.** You should consult with your own tax advisors about your own tax situation before taking any decision or authorizing any transactions. You are responsible for fulfilling your tax obligations in any jurisdiction, even if those obligations relate to opening or using accounts and services offered or provided by HIFC, HSBC or members of HSBC Group. HSBC Group means HSBC Holdings plc, its affiliates, subsidiaries, associated entities, and their branches and offices, together or individually. There may be tax implications in connection with the Bonus Amount(s) paid under this Bonus Offer. Generally, no tax slip or receipt will be issued for the Bonus Amount(s).
14. **You are solely responsible for knowing your contribution limits** for your TFSA, RRSP or other Registered Plan account(s). You should consult with your own tax advisors about your contribution limits before taking any decision or authorizing any transactions.
15. **Your Qualifying Account(s) must remain open** until the day after we invest the Bonus Amount.
16. **HIFC, we, or us** means HSBC Investment Funds (Canada) Inc. **HSBC** means HSBC Bank Canada.
17. **You** or **your** means each Qualifying Account holder who has signed this form.

Important Information for Investors

Issued by HSBC Investment Funds (Canada) Inc. ("HIFC")

HIFC is a direct subsidiary of HSBC Global Asset Management (Canada) Limited ("AMCA") and an indirect subsidiary of HSBC Bank Canada, and provides its services in all provinces of Canada except Prince Edward Island. AMCA is a wholly owned subsidiary of, but separate entity from, HSBC Bank Canada.

AMCA is the manager and primary investment advisor for the HSBC Mutual Funds and the HSBC Pooled Funds (collectively, the "HSBC Funds"). HIFC is the principal distributor of the HSBC Mutual Funds, which are also distributed through authorized dealers. HIFC also offers the HSBC Funds through HSBC World Selection® Portfolio service. This is a portfolio investment service under which client's assets are invested in model portfolios which are comprised of investments in the HSBC Funds. AMCA provides discretionary investment management services to the model portfolios in the HSBC World Selection Portfolio service. Commissions, trailing commissions, management fees, investment management fees and expenses all may be associated with investments in the HSBC Funds and/or the HSBC World Selection Portfolio service. Please read the prospectus, Fund Facts, applicable account opening documentation and any other disclosures before investing in the HSBC Funds and/or the HSBC World Selection Portfolio service. The HSBC World Selection Portfolio service and the HSBC Funds are not guaranteed or covered by the Canada Deposit Insurance Corporation, HSBC Bank Canada, or any other government deposit insurer or financial institution, their values change frequently and past performance may not be repeated. For money market funds, there can be no assurances that the fund will be able to maintain its net asset value per security at a constant amount or that the full amount of your investment in the fund will be returned to you.

® World Selection is a registered trademark of HSBC Group Management Services Limited.

All products and services of HIFC and AMCA are only available for sale to residents of Canada, unless the laws of a foreign jurisdiction permit sales to its residents. Please contact your HSBC Mutual Fund Advisor for more details. These Terms and Conditions should not be considered an offer to sell or a solicitation to buy products or services to any person in a jurisdiction where such offer or solicitation is considered unlawful.

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HSBC Mutual Fund Advisor Name	Branch Number
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