



## HSBC World Selection® 2021 Summer Offer

HSBC Investment Funds (Canada) Inc. 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 has two components – the Initial Investment Bonus and an Ongoing Investment Bonus (together the **Bonus Offer**). This offer begins on June 1, 2021 and ends on August 14, 2021 (the **Offer Period**).

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 the Terms and Conditions of the Bonus Offer;
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 Payment”; and
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:
  - (i) you don’t currently hold the fund, or
  - (ii) you currently hold the fund but you haven’t received the current Fund Facts for that 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
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### Join Qualifying Account Holders:

Customer Name (printed)	Customer Signature	Date
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Customer Name (printed)	Customer Signature	Date
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**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**

- Qualifying Account** means any of the following HSBC Investment Funds (Canada) Inc. (**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 WSDF or WSP. RESP accounts and locked-in registered accounts do not qualify for this Bonus Offer.
- Initial Investment Bonus Details**  
The Initial Investment Bonus Amount for Qualifying Assets is:

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

To qualify for the Initial Investment Bonus, you must:

- Transfer in and invest \$50,000 or more (**Qualifying Assets**) from another financial institution(s) or HSBC Bank account to your Qualifying Account(s) no later than August 14, 2021.
  - Any transfer in amount from an external financial institution must be received by HIFC and invested by September 14, 2021.
  - You can invest in one or more Qualifying Account(s) to participate in this Bonus Offer.
  - For Registered Accounts and Non-Personal Qualifying Accounts, each must meet the minimum Qualifying Assets and each is able to qualify for the Bonus Offer.
  - For non-registered accounts, we handle these as a “group” of accounts and where you transfer assets into multiple non registered account types (joint and/or sole), the Qualifying Assets will be calculated by combining the value of the investable assets transferred into those account(s).
  - 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.
- Maintain the Qualifying Assets in the Account until August 13, 2022.
  - If you withdraw, deregister, or transfer assets out from your Qualifying Account, these amounts will be subtracted from the value of your Qualifying Assets and if reduced below \$50,000, before August 13, 2022, you will not qualify for the Initial Investment Bonus.

### 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 WSDF, a total regular monthly contribution amount of at least \$150. This can be a lump sum or smaller payments throughout the month.
- For investments in WSP, a monthly lump sum contribution of at least \$250.

B. Complete your first PAC by August 14, 2021 and continue the monthly contributions until August 13, 2022 or later.

- If you cancel a PAC Plan for your Qualifying Account between April 9, 2021 and August 13, 2022 (inclusive), you do not qualify for the Ongoing Investment Bonus.

### 4. **Terms of Bonus Payment:**

If you meet all the Terms and Conditions, then on or before August 16, 2022, 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 to invest in your Qualifying Account in accordance with the model portfolio for your HSBC World Selection Portfolio account.

### 5. **Identifying the Qualifying Account that gets the Bonus Amount:**

- We will assess each Registered Qualifying Account and each Non-Personal Qualifying Account on its own basis and we will pay the Bonus Amount into each one of these Qualifying Accounts that meets the 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 the 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 the 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 account terms and conditions. If there is an inconsistency, then the HIFC account terms and conditions take priority.

For a new HSBC World Selection Portfolio account, you must invest at least \$50,000, as this is the minimum amount for the account. You can use that initial investment towards the Qualifying Amount under this Bonus Offer.

10. **We can change, extend or cancel this Bonus Offer at any time without giving you advance notice.** In the event of a cancellation, only fully completed HSBC World Selection 2021 Summer 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 HSBC World Selection Portfolio 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 these Offers. Generally, no tax slip or receipt will be issued for the bonus amount.
14. **You are solely responsible for knowing your contribution limits** for your TFSA, RRSP or other Registered Plan account(s).
15. **Your Qualifying Account must remain open** until the day after we invest the Bonus Amount.
16. **HIFC, we, us or our** 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.

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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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H202105001; Exp. August 14, 2021