

Bank Account Update Form

To: HSBC InvestDirect
Suite 102 – 1725 16th Avenue, Box #5
Richmond Hill, ON L4B 4C6

Fax: 1-866-336-8471
Email: Investdirect@hsbc.ca

In this form, the words “I”, “me” and “my” mean the Client and any Co-Applicant Client. The words “you”, “your” and “yours” mean HSBC InvestDirect. All capitalized terms have the same meaning as in the Client Terms and Conditions.

Important Information:

- Online fund transfers are always processed through the primary bank account on file. Transfers through the secondary bank account must be requested over the phone.
- Bank accounts outside of Canada cannot be linked.
- For other Financial Institutions in Canada, only the Canadian currency account can be linked.
- The bank account must be under the same name(s) as the trading account, for joint accounts, signatures of all account holders are required

HSBC InvestDirect account number(s): _____

Account holder's name: _____

Joint Account holder's name, if applicable: _____

Banking Information

Bank Name

Bank Address

Bank Transit Number Bank Institution Number Bank Account Number Currency

* Please attach a pre-printed void cheque for non-HSBC bank accounts

I would like to (select one only):

- designate the bank account stated above as my primary account.
- designate the bank account stated above as my primary account and remove the existing bank account of the same currency on file.
- designate the bank account stated above as an additional account.

Client Authorization

I acknowledge that I have read the important information above and the applicable sections contained in the Client Terms and Conditions. Please accept this as your authorization to settle my trades and/or transfer funds (upon my authorization) between my bank account and my HSBC InvestDirect account(s).

An electronic client version of the Terms and Conditions is available at www.hsbc.ca/investdirect-terms, or a copy may be requested by contacting HSBC InvestDirect at 1-800-760-1180.

Signature – Account Holder

Signature – Joint Account Holder, if applicable

Date (mm/dd/yyyy)