

Account Number
Plan Contract Number
Order Execution Account

Tax-Free Savings Account Application

Mr. Mrs.
 Miss Dr.

Last Name (Legal)

First Name (Legal)

Middle Name (Legal)

Home Address: _____

Apt./Suite No. and Street

City

Province

Country

Postal Code

Date of Birth: _____

MM/DD/YYYY

Social Insurance Number: _____

Complete this section if you want to designate your spouse as your successor holder of this HSBC InvestDirect Tax-Free Savings Account (HSBC InvestDirect TFSA) in the event of your death.

In this section "I", "me" and "my" means the Applicant/Holder.

I hereby designate my spouse, _____, if living at my death, as the successor holder of this HSBC InvestDirect TFSA and to acquire all rights I have as holder of my HSBC InvestDirect TFSA, other than the right to appoint a successor holder. I hereby revoke any previous designation of successor holder made by me regarding this HSBC InvestDirect TFSA.

Note: This successor holder designation is subject at all times to the laws applicable in the province in which you reside. Your designation of a successor holder to this HSBC InvestDirect TFSA by means of this designation form will not be revoked or changed automatically by any future marriage or divorce. Should you wish to change your successor holder in the event of a future marriage or divorce, you will have to do so by means of a new designation.

Address of spouse (if different from your address)

Social Insurance Number

Complete this section if you have not named a successor holder above and wish to designate a beneficiary or if you have named a successor holder, but wish to designate a beneficiary in case the successor holder predeceases you.

In this section, "I", "me" and "my" means the Applicant/Holder.

I hereby designate the person named below if living at the time of my death, as the beneficiary to receive the proceeds of this HSBC InvestDirect TFSA. If the beneficiary named below is not living at the time of my death, such benefits shall be payable to my estate. I revoke any previous designation of beneficiary made by me regarding this HSBC InvestDirect TFSA.

Note: This beneficiary designation is subject at all times to the laws applicable in the province in which you reside. Your designation of a beneficiary to this HSBC InvestDirect TFSA by means of a designation form will not be revoked or changed automatically by any future marriage or divorce.

First Name (Legal)

Last Name (Legal)

Relationship to Applicant/Holder

By signing below, the Applicant/Holder ("you") confirm that you have read, understood and agree to be bound by the provisions set out in this HSBC InvestDirect TFSA application form, the HSBC InvestDirect Client Terms and Conditions, the HSBC InvestDirect Account Agreement, the Client Information Consent and the HSBC InvestDirect Tax-Free Savings Account Declaration of Trust. You also confirm that you are applying to HSBC Trust Company (Canada) (the "Trustee"), located at 500-885 West Georgia Street, Vancouver, BC, for an HSBC InvestDirect Tax-Free Savings Account (the "Account") and that you request the Trustee to file with the Minister of National Revenue an election to register the qualifying arrangement as a TFSA under section 146.2 of the Income Tax Act (Canada) and, if applicable, under any applicable provincial tax legislation.

You hereby authorize and appoint HSBC InvestDirect* to act on your behalf as your agent for all purposes under the Account including establishing the Account, transmitting your investment decisions and dealing with the Trustee on your behalf.

X

Signature of Applicant/Holder

Date (MM/DD/YYYY)

Signature of HSBC InvestDirect, for and on behalf of HSBC Securities (Canada) Inc., and HSBC Trust Company (Canada).

HSBC InvestDirect Supervisor Signature

HSBC InvestDirect Supervisor Name

Date (MM/DD/YYYY)

Note: Signed by the Supervisor, for and on behalf of HSBC InvestDirect as agent for the Trustee. All forms must be returned to HSBC InvestDirect for approval.

* HSBCInvestDirect, a division of HSBC Securities (Canada) Inc., a wholly owned subsidiary of, but separate entity from, HSBC BankCanada. Member CIPF. As HIDC is a division, not a legal entity, client is entering into an Agreement with HSBC Securities (Canada) Inc.