

HSBC Bank Canada

**TAX-FREE SAVINGS ACCOUNT
DESIGNATION OF SUCCESSOR HOLDER AND BENEFICIARY**

Tax-Free Savings Account Number

Instructions: This form is for designating a successor holder and/or a beneficiary to an HSBC Bank Canada Tax-Free Savings Account. You can designate either a successor holder or a beneficiary or both. This form should be used to make designations for the first time or to change a current designation in place for the account. For the purposes of this form, spouse refers to a person recognized as your spouse or common-law partner for purposes of the *Income Tax Act* (Canada).

Caution: Subject to the specific terms of the designations below, your designation of a successor holder and/or beneficiary to the HSBC Bank Canada Tax-Free Savings Account referenced above by means of this form may **not** be revoked or changed automatically by any future marriage or divorce. Should you wish to change your successor holder or beneficiary in the event of a future marriage or divorce or for any other reason, you will have to do so by means of a new designation. This designation of successor holder and/or beneficiary holder will apply to the HSBC Bank Canada Tax-Free Savings account referenced in this form **only**. If you have other tax-free savings accounts with HSBC Bank Canada or with another HSBC entity, you must complete separate documentation for each of these accounts in order to designate a successor holder and/or beneficiary.

This beneficiary and successor holder designation is subject at all times to the laws applicable in the province or territory in which you reside.

SUCCESSOR HOLDER DESIGNATION	
<p>Complete this section if you wish to designate your spouse as successor holder to the TFSA Account referenced above in the event of your death.</p>	
<p>I (<i>Print Your Full Name</i>) _____ the undersigned Account Holder, Social Insurance Number _____</p>	
<p>Address _____</p>	
<p>hereby revoke any beneficiary or successor holder designation made by me prior to the date hereof regarding the HSBC Bank Canada Tax-Free Savings Account referenced by the account number above (the "Account") and hereby designate my spouse:</p>	
<p>_____</p> <p style="text-align: center;"><i>(Print Full Name of Spouse)</i></p>	<p>Social Insurance Number _____</p> <p style="text-align: center;"><i>(Fill in Spouse's SIN)</i></p>
<p>if living and remaining my spouse at the time of my death, as the successor holder to the Account to acquire all rights I have as holder of the Account, other than the right to appoint a successor holder. I reserve the right to revoke this designation.</p>	
<p>_____</p> <p><i>Date</i></p>	<p style="text-align: center;">X</p> <p>_____</p> <p><i>Signature of Account Holder</i></p>
<p>_____</p> <p><i>Print Name of Witness</i></p>	<p style="text-align: center;">X</p> <p>_____</p> <p><i>Signature of Witness</i></p>

BENEFICIARY DESIGNATION

Complete this section if you wish to designate a beneficiary to receive the proceeds of the TFSA account referenced above in the event of your death where either (a) you have not designated a successor holder for the TFSA account referenced above; or (b) you have designated a successor holder for the TFSA account referenced above but such individual has either pre-deceased you or is not your spouse at the time of your death.

I (*Print Full Name*) _____ the undersigned Account Holder, Social Insurance Number _____

Address _____

hereby revoke any successor holder or beneficiary designation, made by me prior to the date hereof, regarding the HSBC Bank Canada Tax-Free Savings Account referenced by the account number above (the "Account") and, subject to any valid successor holder designation for the Account made on the date hereof, which designation will take priority, hereby designate:

_____ my _____
(Print Full Name of Beneficiary) *(Relationship)*

if living at the time of my death, as the beneficiary to receive the proceeds of the Account. If the beneficiary named above is not living at the time of my death, such benefits shall be payable to my estate. I reserve the right to revoke this designation.

_____ X _____
Date *Signature of Account Holder*

_____ X _____
Print Name of Witness *Signature of Witness*

IMPORTANT REMINDER: If you complete a new designation on this form to replace an existing designation you already have in place, **this will revoke all previous successor holder and beneficiary designations you have made in the past for the HSBC Tax-Free Savings Account referenced in the form.** Therefore, if you have both a successor holder and a beneficiary designation in place for a particular tax-free savings account, you should complete and sign a new successor holder **and** beneficiary designation **every time** you make a change to either.