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GUARANTEED INVESTMENT CERTIFICATE (G.I.C.) APPLICATION

14th Floor – 888 Dunsmuir Street, Vancouver, BC V6C 3K4
Phone: 604-683-2881 Fax: 604-683-5110
Toll Free: 1-800-663-0324 www.peoplestrust.com

Customer Number(s)	Account Number
(For Office Use Only)	

Purpose of Doing Business with Peoples Trust:	Application Was Completed:	Account Type:
☐ Opening an Investment Account	☐ In Person	☐ Individual ☐ Joint ☐ Other _____
☐ Other_____	☐ By Mail or Electronic Means	☐ New Customer ☐ Existing Customer

Applicant: *(If more than 2 applicants, complete an additional Application Form)*

Name	Phone # (incl. area code)	S.I.N.	D.O.B. (DD/MM/YY)
Address	City	Province	Postal Code
Applicant Email	Occupation*	Employer	

Co-Applicant:

Name	Phone # (incl. area code)	S.I.N.	D.O.B. (DD/MM/YY)
Address	City	Province	Postal Code
Applicant Email	Occupation*	Employer	

U.S. Citizenship or Residency:

Do you hold U.S. Citizenship or are you a resident of the U.S.? ☐ YES ☐ NO
If yes, please provide tax identification number (TIN) _____

Foreign Residency:

Are you a resident of another foreign country? ☐ YES ☐ NO
If yes, please provide county _____ TIN _____

Registration Details for More Than One Owner:

☐ Joint Tenants with Right of Survivorship
☐ Tenants in Common

Signing Authority:

☐ ANY one to sign or provide instructions
☐ ALL must sign and provide instructions

G.I.C. Investment Details: **Eligible for Canada Deposit Insurance Corporation (CDIC) Coverage**

Principal Sum _____ Issue Date DD MM YY Maturity Date DD MM YY Term Months Days Interest Rate

G.I.C. Investment Type:

This Form is for Non-Registered G.I.C.s only

This G.I.C. is Non-Redeemable Prior to Maturity

Interest Payment Frequency:

☐ **Annual** (Interest Paid Annually) ☐ **Annual Compound** (Interest Paid at Maturity)
☐ **Maturity**

Third Party Declaration:

Will this GIC Investment be used on behalf of anyone not disclosed on this application? (If yes, please provide details on a separate Third Party Information Form) ☐ YES ☐ NO

Politically Exposed Person (PEP)

Are you a PEP, a HIO, or a family member or close associate to a PEP or HIO? (If yes, please provide the specific details on a separate PEP Form) ☐ YES ☐ NO

A PEP is an individual who holds or has held office or a senior position in or on behalf of a country, government, military, or judiciary, or, is or was a head of an international organization (HIO), a leader or president of an organization funded by multiple nations or states, regardless of their citizenship, residency status or birth place.

Intended Use of Account:

☐ Saving/Investment ☐ Vacation ☐ Retirement ☐ Education ☐ Other (Please specify) _____

Acknowledgement Section:

By signing this application I/we acknowledge that: I/we have received, read and understand the Terms & Conditions. I/we consent to the collection, use and disclosure of my/our personal information as outlined in the Terms & Conditions. I/we consent to an indentification check to confirm my/our identity. I/we hereby apply to be the Registered Holder(s) of the account as set out above.

Applicant Signature _____ Co-Applicant Signature _____ Date_____

After completing this application form, send it together with your pre-printed personal cheque payable to yourself to:

Peoples Trust Company
1400 – 888 Dunsmuir Street, Vancouver, BC V6C 3K4

If you are opening a joint account, we require a pre-printed personal cheque for each registered owner – either one cheque with both names endorsed by both parties, or a separate cheque endorsed by each owner.

** If self-employed, state the nature of employment. If retired, please state your occupation before retirement.*