



# ACCOUNT APPLICATION (Personal Accounts Only)

Suite 1400 – 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:	
<input type="checkbox"/> Opening an Investment Account	<input type="checkbox"/> In Person	<input type="checkbox"/> Individual	<input type="checkbox"/> Joint	<input type="checkbox"/> Other _____	
<input type="checkbox"/> Other _____	<input type="checkbox"/> By Mail or Electronic Means	<input type="checkbox"/> New Customer	<input type="checkbox"/> 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:	Foreign Residency:
Do you hold U.S. Citizenship or are you a resident of the U.S.? <input type="checkbox"/> YES <input type="checkbox"/> NO If yes, please provide tax identification number (TIN) _____	Are you a resident of another foreign country? <input type="checkbox"/> YES <input type="checkbox"/> NO If yes, please provide county _____ TIN _____

Registration Details for More Than One Owner:	Signing Authority:
<input type="checkbox"/> Joint Tenants with Right of Survivorship <input type="checkbox"/> Tenants in Common	<input type="checkbox"/> ANY one to sign or provide instructions <input type="checkbox"/> ALL must sign and provide instructions

Third Party Declaration:
Will this Account be used on behalf of anyone not disclosed on this application? (If yes, please provide details on a separate Third Party Information Form) <input type="checkbox"/> YES <input type="checkbox"/> 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) <input type="checkbox"/> YES <input type="checkbox"/> NO <i>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.</i>

Intended Use of Account:
<input type="checkbox"/> Saving/Investment <input type="checkbox"/> Vacation <input type="checkbox"/> Retirement <input type="checkbox"/> Education <input type="checkbox"/> Other (Please specify) _____

Initial Deposit
<input type="checkbox"/> Personal Cheque enclosed for \$ _____

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 identification 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**  
Suite 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.