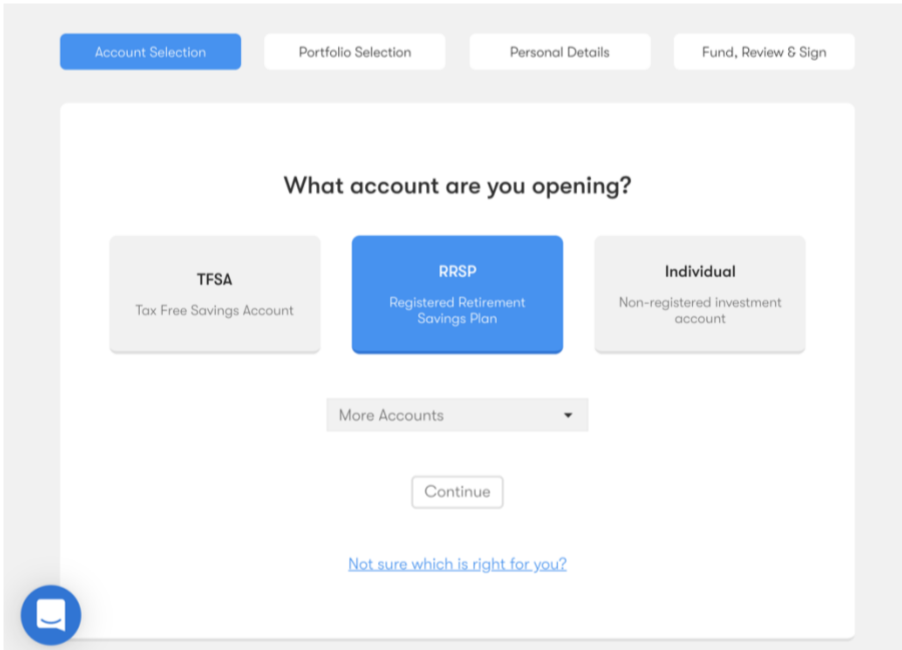
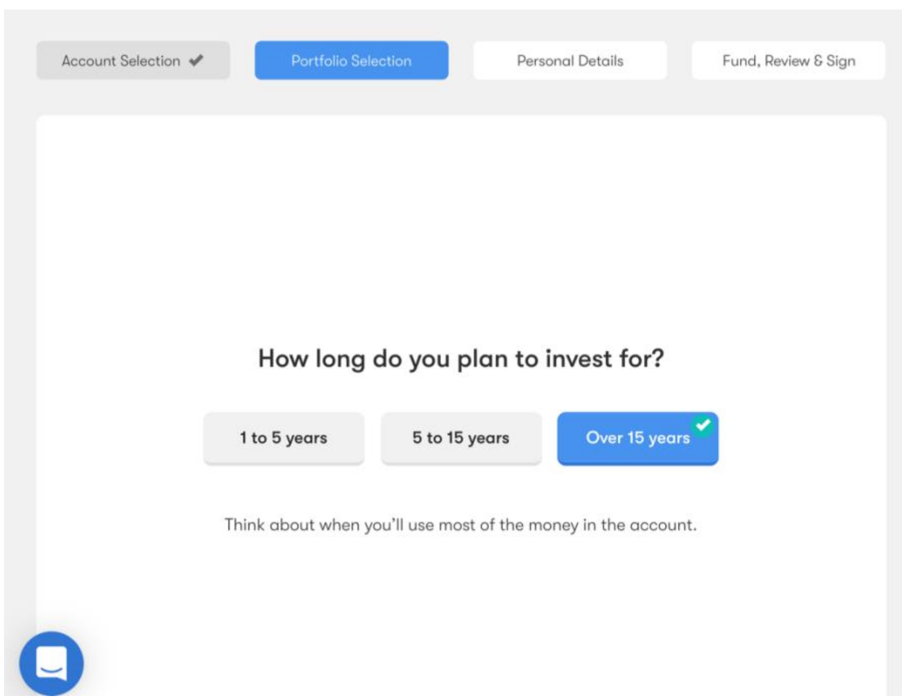
Steps

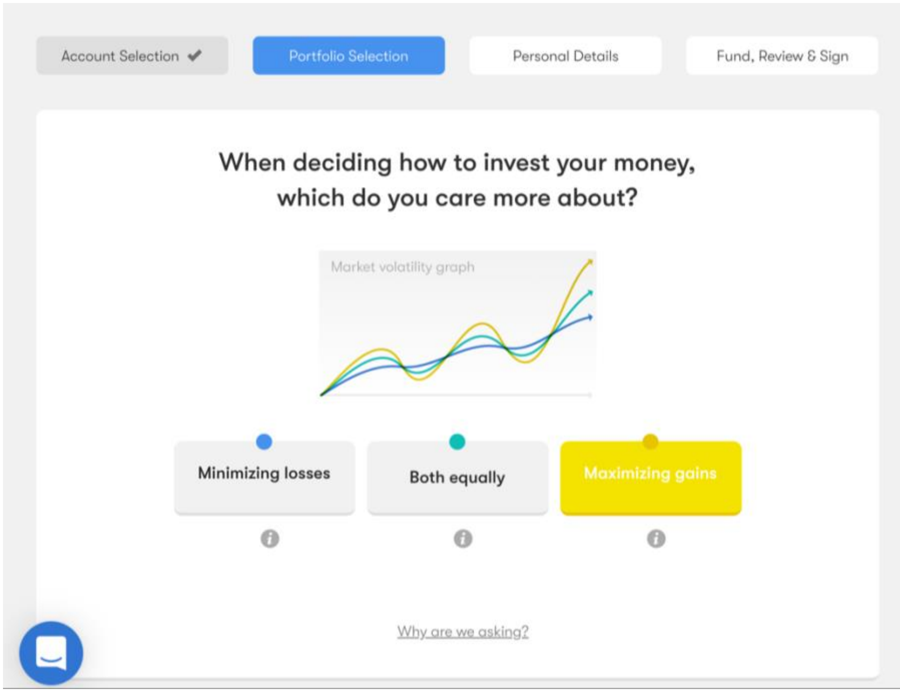
1) Select the account type (additional accounts in “More Accounts”)



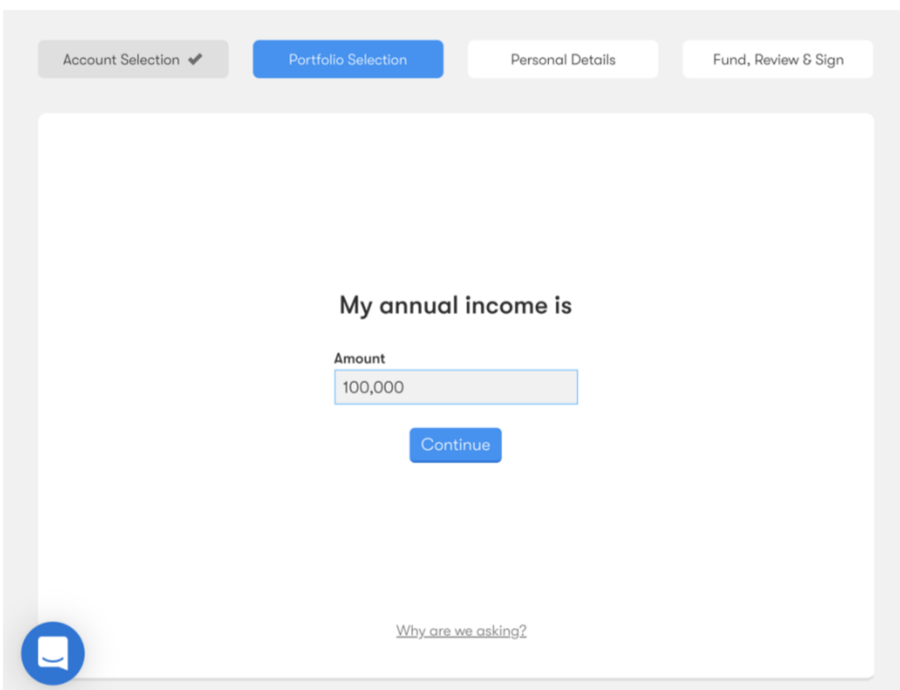
2) Time horizon for the account



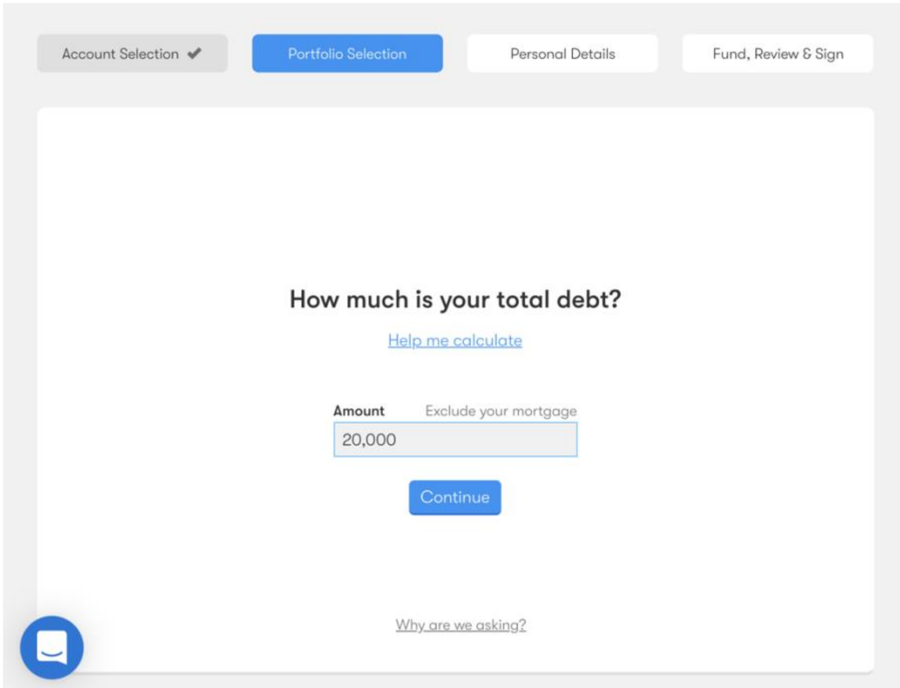
3) Investment philosophy



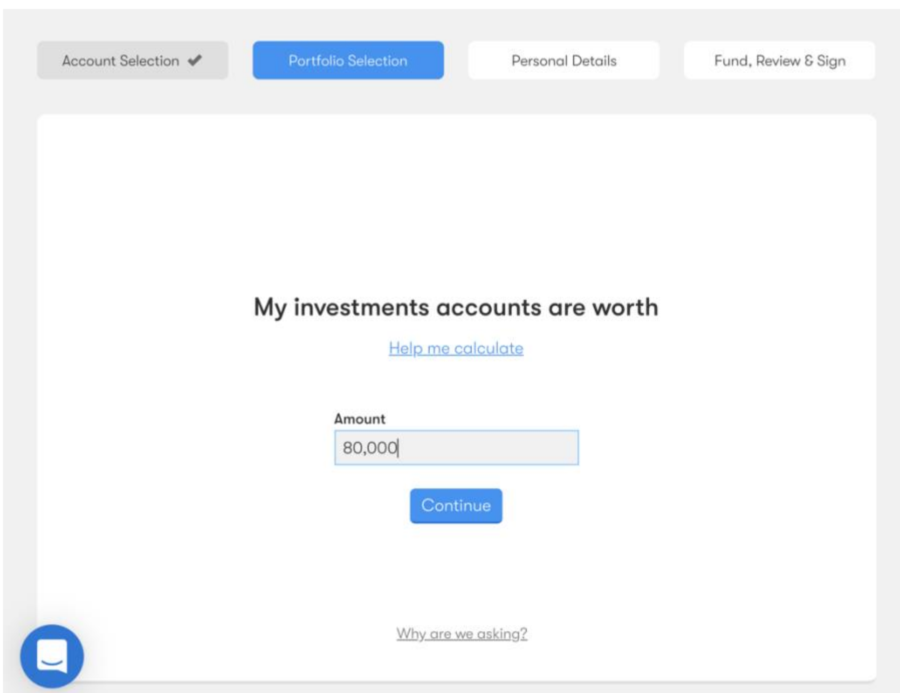
4) Annual income



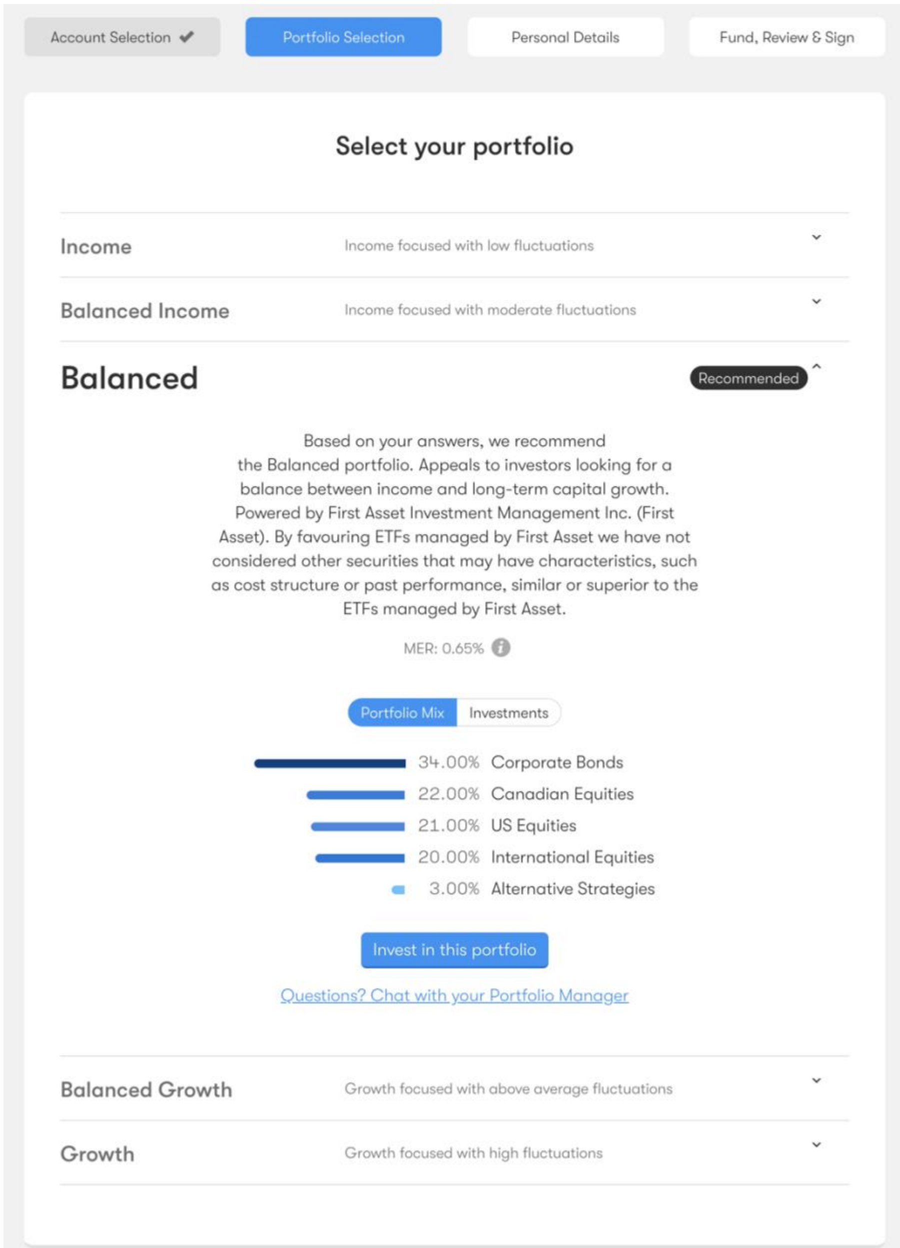
5) Total debt



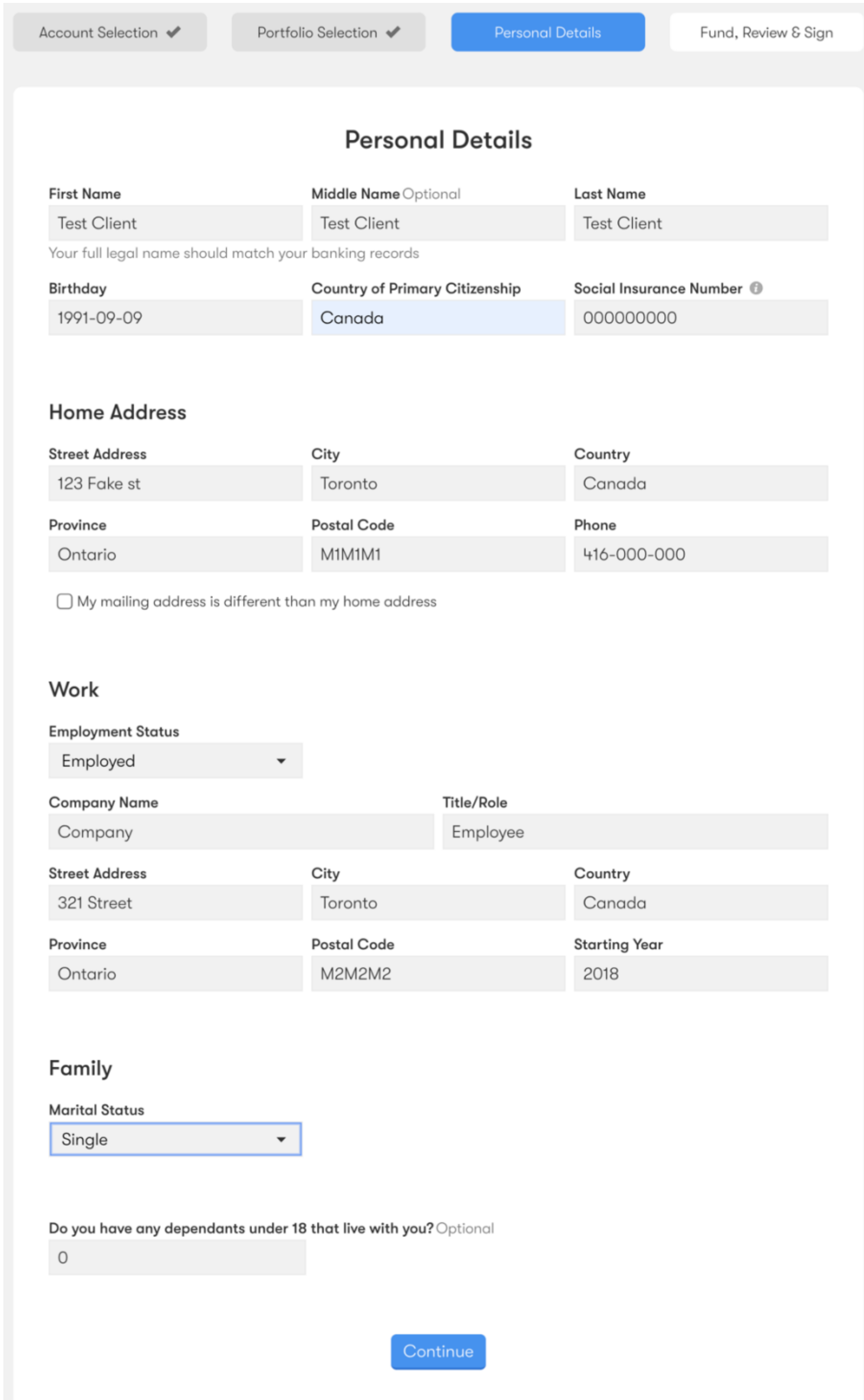
6) Value of accounts



7) Select a portfolio - The portfolio selection will be based on the KYC information provided by the client, but they can select any risk level desired at this step. If the portfolio selected is significantly riskier than the recommendation, one of our Portfolio Managers will need to confirm it with the client directly before funds can be invested.



8) Personal details


Account Selection ✔ | Portfolio Selection ✔ | Personal Details | Fund, Review & Sign

Personal Details

First Name: Test Client
Middle Name Optional: Test Client
Last Name: Test Client

Your full legal name should match your banking records

Birthday: 1991-09-09
Country of Primary Citizenship: Canada
Social Insurance Number: 000000000

Home Address

Street Address: 123 Fake st
City: Toronto
Country: Canada
Province: Ontario
Postal Code: M1M1M1
Phone: 416-000-000

☐ My mailing address is different than my home address

Work

Employment Status: Employed

Company Name: Company
Title/Role: Employee

Street Address: 321 Street
City: Toronto
Country: Canada
Province: Ontario
Postal Code: M2M2M2
Starting Year: 2018

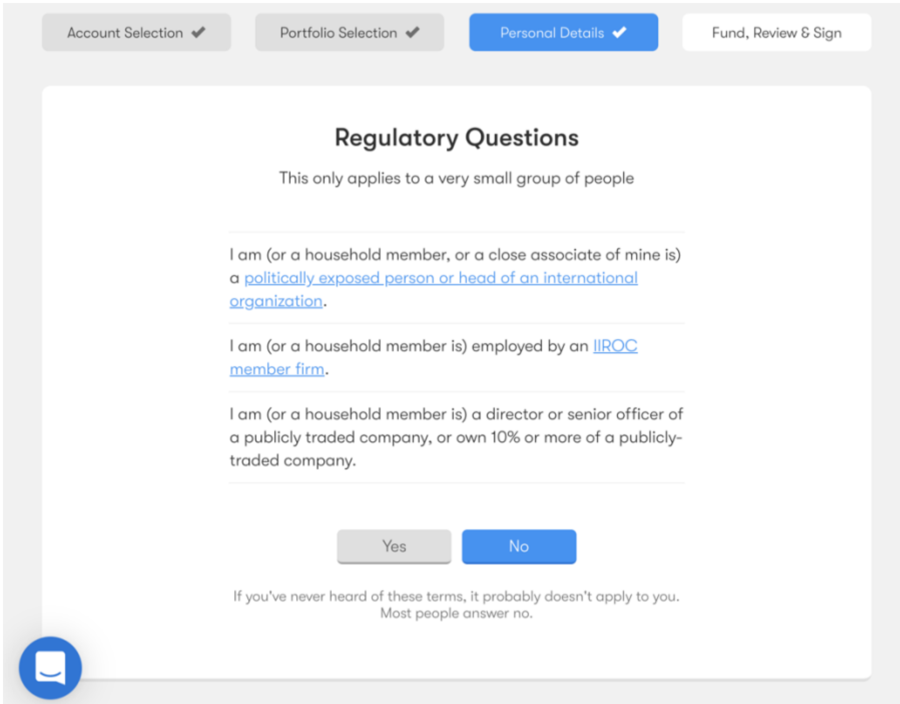
Family

Marital Status: Single

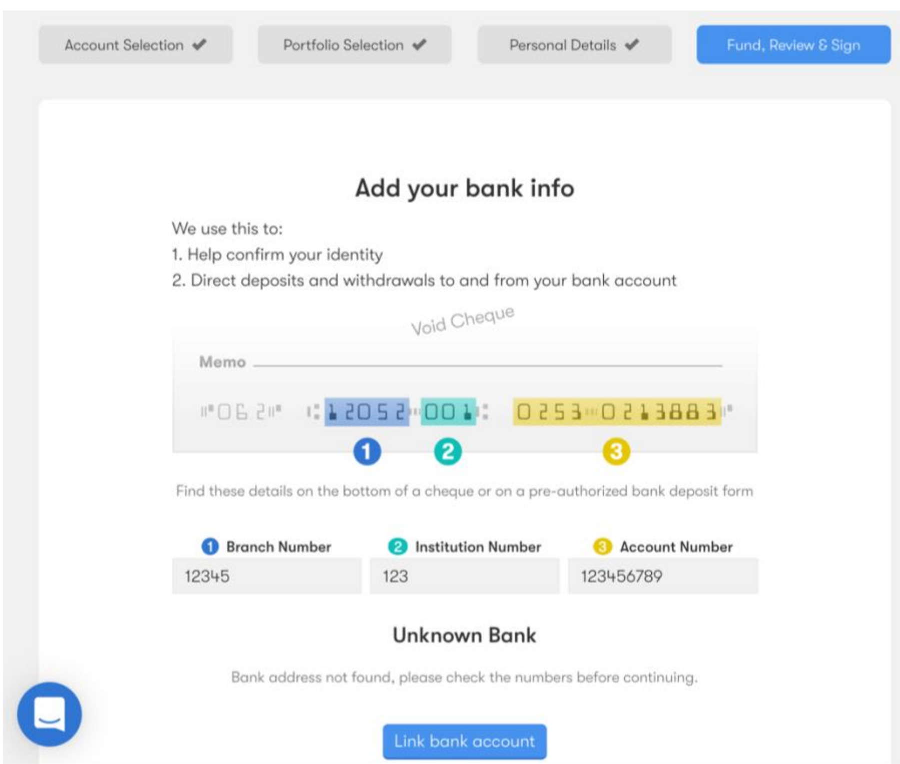
Do you have any dependants under 18 that live with you? Optional
0

Continue

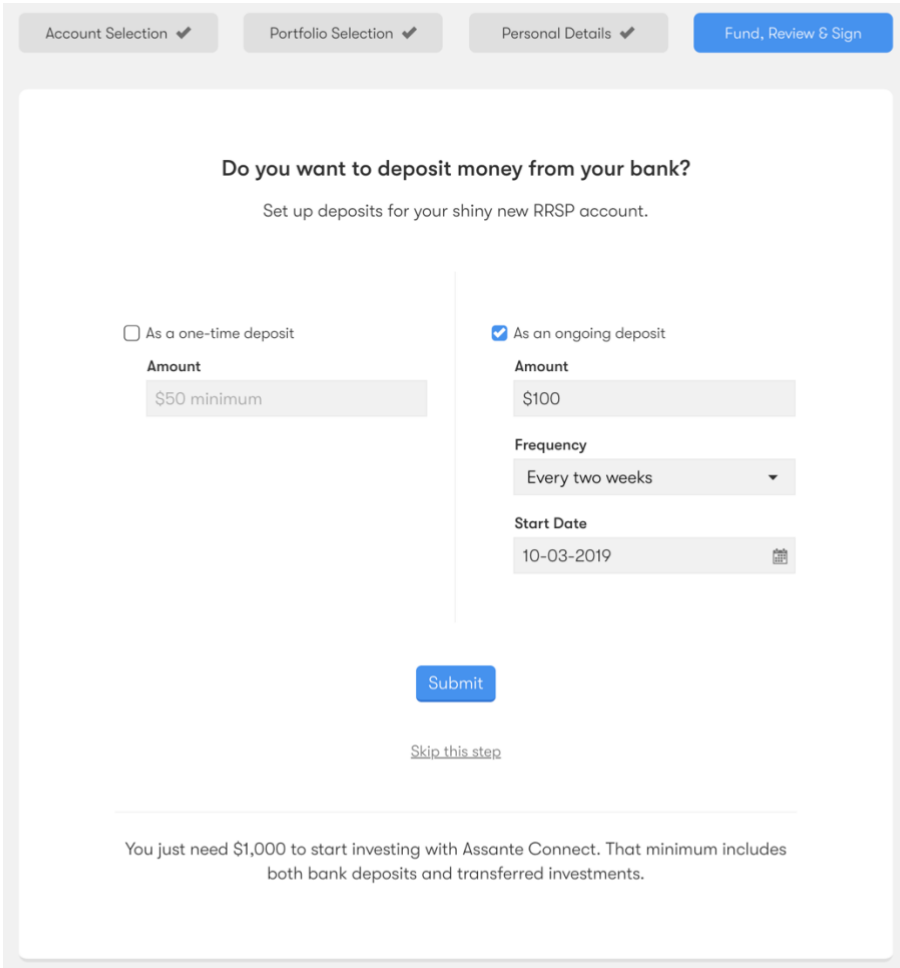
9) Regulatory questions



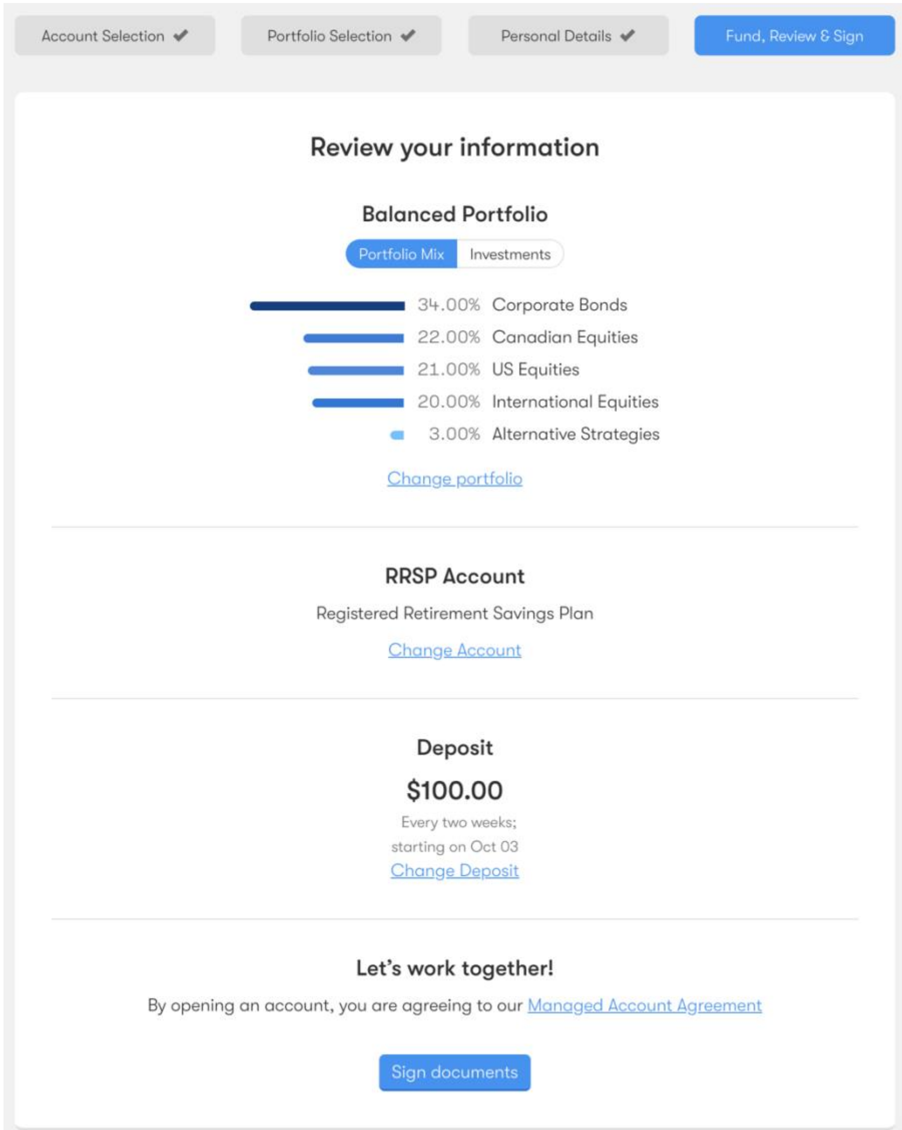
10) Banking information - Clients can have one bank account linked to each investment account that will be used for all future deposits and withdrawals for this account



11) Deposits – The client can set up any recurring or one-time contributions to the account



12) Review information – Review before signing the account application



13) Sign account application

RRSP Agreement

BBS Securities Inc.
199 Bay Street, Suite 2600, Toronto, ON, M5L 1E2 Canada
Phone: 1.877.310.1088 Fax: 416.288.8611

Application Form
Self-directed Retirement Savings Plan

Account # ____________________
(RSP 574-620)

Account Information

☒ Client account	**Account type**	☒ Individual RSP	☐ Spousal - C-LP RSP	☐ Locked-in RSP
☐ Employee account				
☐ Update	**Transfer from**	☐ RRSP	☐ Spousal - C-LP RRSP	☐ Locked-in RRSP ** (LIRA)
☐ Change of beneficiary		☐ RRIF	☐ Spousal - C-LP RRIF	☐ Locked-in RRIF **
		☐ RPP	☐ Locked-in RPP**	

**You must complete and sign a locked-in addendum for jurisdiction of pension plan and attach it with the application form. - "C-LP means "common-law partner"

Currency of the account

☒ Canadian Dollars ($) ☐ US Dollars ($)

Annual Fee Instructions

☒ Charge my RSP account annually ☐ Charge my cash / margin account #____________________ annually

Information on the Annuitant

☐ Mr. ☐ Mrs.

Last name	Test Client
First name & initials	Test Client T.
Social Insurance Number	000000000
Address	123 Fake st
Apt.	
Birth Date	Sep/09/1991
City	Toronto
Province	ON
Postal Code	M1M1M1
Home Phone Number	416-000-0000
Business Phone Number	

Spouse or common-law partner Information

Complete this section only if the spouse or common-law partner of the annuitant will be contributing to the Plan.

☐ Mr. ☐ Mrs.

Last name	
First name & initials	
Social Insurance Number	Mandatory
Address (if different from above)	
Birth Date	(mm / dd / yyyy)

Designation of beneficiary

I hereby revoke any previous designations of the beneficiary made by me for this Plan and I hereby designate the person named below, if then living, as beneficiary to receive the proceeds payable under the Plan in the event of my death. I am solely responsible for ensuring that this designation of beneficiary is legally valid.

Name of beneficiary in full	
Beneficiary's Social Insurance Number	
Address of beneficiary	
Relationship to Annuitant	

CAUTION: In some provinces, your designation of beneficiary by means of a designation form will not be revoked or changed automatically by any future marriage or S divorce. If you wish to change your beneficiary, you will have to do so by means of a new designation.

To: Computershare Trust Company of Canada (the "Trustee")

I hereby apply for a BBS Securities Inc. Self-directed Retirement Savings Plan (the "Plan") in accordance with the terms and conditions of this Application and the Declaration of Trust attached hereto. By signing below, I have agreed that:

1. I have read, understood and I agree to the terms of the Declaration of Trust.
2. I declare that the information given in this Application is true, correct and complete.
3. I request that the Trustee applies for registration of the Plan as a registered retirement savings plan under the Income Tax Act (Canada).
4. I am solely responsible for determining my contribution limits, my investment decisions and whether an investment is qualified under the Tax Laws, and I am aware of the consequence of acquiring and holding investments which are not qualified in accordance with the Declaration of Trust.
5. The Trustee may delegate certain of its duties relating to the BBS Securities Inc. as its Agent.
6. The Trustee and the Agent have no obligation to give me investment advice in connection with the purchase, retention or sale of any investment.
7. Any benefit received under the Plan is taxable under the Income Tax Act (Canada).
8. In the event of my death, the proceeds of the Plan will be paid to the beneficiary, if any, whom I have designated in this Application, if permitted by law. Otherwise, such proceeds will be paid to my estate.

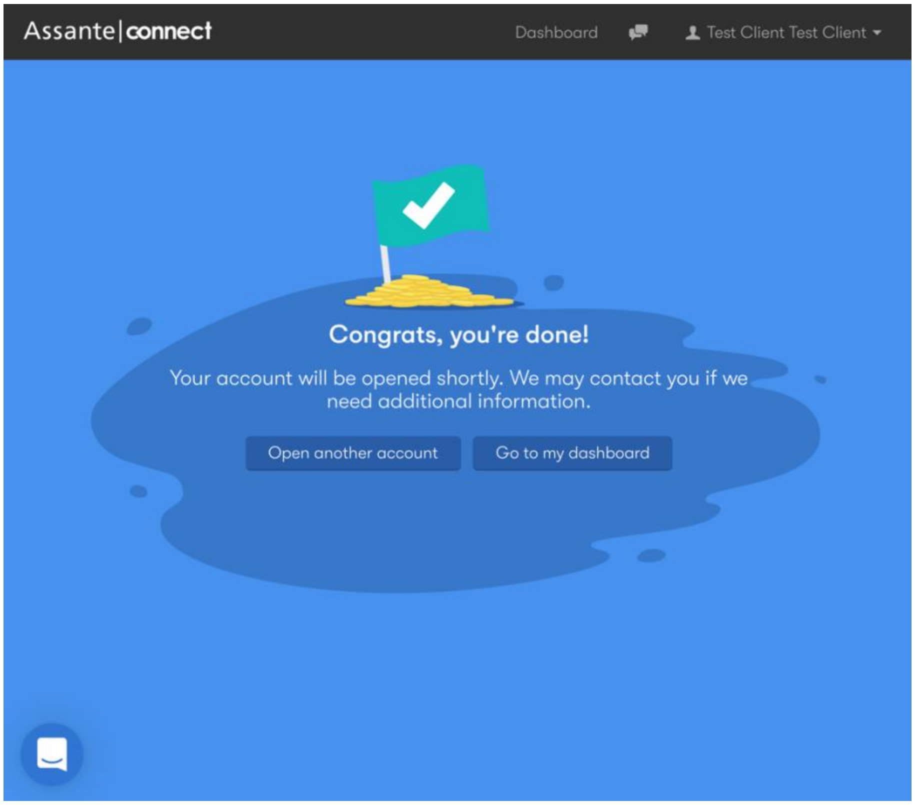
ANNUITANT'S SIGNATURE

Signed at Toronto this 9th day of September 20 19.

Test Client (Sep 9, 2019)

Annuitant's Signature

14) Confirmation page



15) Client's Assante Connect Dashboard - From here, they can open any additional accounts needed or submit an account transfer.