

USE THIS FORM TO:

- PURCHASE B2B BANK GICS IN B2B BANK DEALER SERVICES ("B2BBDS") ACCOUNTS, OR
- PURCHASE OTHER COMPANY'S ELIGIBLE GICS/GIAs AS INDICATED IN THE MOST RECENT B2BBDS LIST OF ELIGIBLE FUNDS AND GUARANTEED INVESTMENTS IN B2BBDS ACCOUNTS

1. CLIENT INFORMATION

☐ 1-MR. 2-MRS. ☐ 3-MISS 4-MS. ☐ 5-DR. 6-PROF.				
		B2BBDS ACCOUNT # (IF EXISTING)		
LAST NAME		FIRST NAME		INITIALS

2. GUARANTEED INVESTMENT INFORMATION – GICs / GIAs

\$		%
PRINCIPAL	TERM (YEARS)	RATE
INTEREST PAYMENT FREQUENCY:	☐ PAID ANNUALLY	OR ☐ COMPOUNDED TO MATURITY
NAME OF INSTITUTION		
AGENT CODE (AT ISSUING INSTITUTION)		
BRANCH ADDRESS		
CONTACT NAME (REQUIRED IF RATE HAS BEEN GUARANTEED BY ISSUING INSTITUTION)		
PHONE NUMBER	FAX NUMBER	EMAIL ADDRESS

\$		%
PRINCIPAL	TERM (YEARS)	RATE
INTEREST PAYMENT FREQUENCY:	☐ PAID ANNUALLY	OR ☐ COMPOUNDED TO MATURITY
NAME OF INSTITUTION		
AGENT CODE (AT ISSUING INSTITUTION)		
BRANCH ADDRESS		
CONTACT NAME (REQUIRED IF RATE HAS BEEN GUARANTEED BY ISSUING INSTITUTION)		
PHONE NUMBER	FAX NUMBER	EMAIL ADDRESS

Please note, rates can change without notice. Please provide contact name if your rate has been guaranteed by the issuing institution. B2BBDS does not guarantee rates.
Branch information is only required if you want the GIC/GIA placed with a specific branch of the issuing institution.

3. DEALER / ADVISOR INFORMATION

DEALER #	DEALER NAME (PLEASE PRINT)	ADVISOR #	ADVISOR NAME (PLEASE PRINT)

4. SIGNATURES

CLIENT'S SIGNATURE	DATE (mm/dd/yyyy)	ADVISOR'S SIGNATURE	DATE (mm/dd/yyyy)

B2B Bank Dealer Services includes B2B Bank Financial Services Inc., B2B Bank Securities Services Inc., and B2B Bank Intermediary Services Inc. B2B Bank Financial Services Inc. and B2B Bank Securities Services Inc. are members of the Canadian Investment Regulatory Organization (CIRO) and members of the Canadian Investor Protection Fund (CIPF). B2B Bank Intermediary Services Inc. is operating in Quebec and regulated by the Autorité des marchés financiers (AMF). B2B Bank is a trademark used under license.

100-06-202E (12/31/2024)