

# Investment Savings Account (ISA) Enrollment Form

ING DIRECT



For information on how to complete this Form, see reverse.

## Please tell us about yourself.

- MR.  MRS.  DR.  
 MS.  MISS

FIRST NAME INITIAL LAST NAME

Address:

UNIT STREET

CITY PROVINCE POSTAL CODE

Social Insurance Number (Must be completed): Date of Birth (Must be completed):

DAY MONTH YEAR

Residence Telephone: Business Telephone:

Email:

Occupation (Must be completed):

## Please make this a joint account. Read step 2 on the next page for details on submitting your cheque.

- MR.  MRS.  DR.  
 MS.  MISS

FIRST NAME INITIAL LAST NAME

Social Insurance Number (Must be completed): Date of Birth (Must be completed):

DAY MONTH YEAR

Occupation (Must be completed):

## Select the account type you wish to open.

- Investment Savings Account (ISA) OR  
 US Dollar Investment Savings Account (US \$ ISA)

Log on to [ingdirect.ca](http://ingdirect.ca) or call us at 1-800-ING DIRECT for current rate information or if you would like to open a GIC.

## Other information; please answer the following: This section must be completed.

Anti-money laundering legislation requires us to obtain the following information. This section is mandatory and we cannot open your account without this information, which will remain strictly confidential.

What will the funds in this account be used for?

- Personal Savings OR  Other

If Other, please specify here:

Will this account be used by or on behalf of another party who is not registered on the account?  NO  YES

If YES, please call 1-800-ING DIRECT (1-800-464-3473).

## I/we apply to open an ING DIRECT Account.

I/we agree and acknowledge that ING Bank of Canada ("ING DIRECT") will verify the information provided above to ensure its accuracy and confirm my/our identity. I/we acknowledge that I/we must send in a personal cheque(s) to ING DIRECT and I/we instruct ING DIRECT to clear this cheque(s) from my/our personal chequing account(s) in order to open this account. I/we understand that I/we must call ING DIRECT to activate this account once my/our personal cheque(s) has/have cleared in order to transact on the account. I/we acknowledge that I/we have read and understood the ING DIRECT Account Terms, and agree to be bound by them as they relate to this account, which shall be further confirmed by the receipt of my/our signed personal cheque(s) by ING DIRECT. I/we confirm that I/we have read and understood the ING DIRECT Privacy Code (the "Code") and I/we consent to the collection, use and disclosure of my/our personal information in accordance with the Code, as amended from time to time.

Client Signature: X

Date: \_\_\_\_\_  
DAY MONTH YEAR

Client Signature (If joint account): X

Authorized ING DIRECT Officer:

Open your account by completing the Enrollment Form on page 1, following the instructions below:

### Tell us about yourself:

- To ensure that your account is opened promptly, please check that all sections of this box are correct and complete, including your name, address, home and business telephone numbers, Social Insurance Number, and date of birth.
- Please provide your occupation.
- You must provide your date of birth and Social Insurance Number (SIN). This allows us to verify your identity and is a requirement for interest reporting.

### To make it a joint account:

- Provide the name, Social Insurance Number (SIN), date of birth, and the occupation of the joint account holder.
- The joint account holder must **sign** the Form.

### Select the account you wish to open:

- Please mark your account selection with an X. Once your initial deposit is processed, log on to [ingdirect.ca](http://ingdirect.ca) or call us at **1-800-ING DIRECT** if you would like to open a GIC or USD GIC.

### Why we ask about other information:

- In order to fulfill regulatory obligations, ING DIRECT must ask all Clients what the funds in the account will be used for and if the account will be used by or on behalf of another party.

### Open your account in 3 easy steps:

1. Complete and sign the Enrollment Form.
2. Write a cheque payable to yourself.

The cheque must be pre-printed with your full name, made payable to you, and drawn on a Canadian bank for the amount you wish to deposit. Example:

If opening a joint account, you have the option to send a cheque drawn on your joint account, made payable to **both** names, with **both** signatures appearing on the cheque. **OR**, you can each send a personal cheque.

Remember, the cheque must have your full name pre-printed on the front, you must make the cheque payable to you and the cheque must be drawn on a Canadian bank.

For the US \$ Investment Savings Account, please send a personal, pre-printed US dollar cheque (with your name on it) drawn on a Canadian financial institution, made payable to yourself.

Be sure to write "US funds" on the front of the cheque.

This step allows us to confirm your identity.

3. Please mail the Form and cheque(s) to:

**ING DIRECT, 111 Gordon Baker Road, Toronto, ON M2H 3R1**

Once your cheque(s) has/have cleared, call us to confirm the banking information and set up a PIN and password.

ING DIRECT will use the banking information on the cheque to establish a link. The link allows you to electronically transfer funds from your chequing account to your ING DIRECT ISA.

With your PIN and Client Number, you have everything you need to access your account 24 hours a day, seven days a week.

**Note:** Joint account holders will receive their Client Number when they call in to confirm the banking information on their cheque(s).

