

Account Number

- New
- Change
- Add Additional Account

Electronic Funds Transfer (EFT) Setup Form

Use this form to link your banking information so that future requests can be processed by Fidelity Clearing Canada ULC ("Fidelity"). To request a funds transfer from your CAD & US investment account to your savings/chequing bank account, contact Clear Street Canada Inc ("Clear Street") at support@centerpointsecurities.ca or 1-844-357-8283.

1. Client Information

Client First Name	M.I.	Last Name
Joint Applicant First Name	M.I.	Last Name

2. Bank Information

Attach a void cheque or acceptable alternate form of bank verification with this form and provide the bank information.

Bank Information #1

Name of Bank			Currency
			<input type="checkbox"/> CAD <input type="checkbox"/> USD
Bank Transit Number	Institution Number	Bank Account Number	

Bank Information #2

Name of Bank			Currency
			<input type="checkbox"/> CAD <input type="checkbox"/> USD
Bank Transit Number	Institution Number	Bank Account Number	

Bank Information #3

Name of Bank			Currency
			<input type="checkbox"/> CAD <input type="checkbox"/> USD
Bank Transit Number	Institution Number	Bank Account Number	

3. Signatures and Dates *Form cannot be processed without signatures and dates.*

By signing below, you:

- Hereby authorize Fidelity Clearing Canada ULC (Fidelity) to make payments to the bank account(s) identified above based on the instructions given to us by Clear Street.
- Understand that changes to the bank account(s) noted above or to add an account in addition to the account(s) noted above at a later date must be made in writing using a new EFT Setup form.
- Understand that the banking information you send must be for an account at a Canadian bank held in your name solely or jointly.
- Agree that you may revoke your authorization by providing written notice to Fidelity or Clear Street with 15 business days' prior notice and you have certain recourse rights if any credit to your bank account does not comply with this agreement. For example, you have the right to dispute or reverse any credit that is not authorized by you or Clear Street. To obtain more information on your recourse rights, contact your Clear Street or visit <https://payments.ca/>.

Client Signature	Date MM - DD - YYYY
	

Joint Applicant's Signature	Date MM - DD - YYYY
	