

# Investment Form/Managed Accounts

## **ACTION REQUIRED — HAVE YOU OPENED YOUR ACCOUNT?**

We are pleased to inform you that at the request of the State of Israel, Canada-Israel Securities Limited (CISL) / Israel Bonds registered as an Exempt Market Dealer, whose primary regulator is the Ontario Securities Commission and securities regulators/securities regulating authorities in other Provinces and Territories of Canada.

As registrants, we are now required to ask each of our clients to complete in full on a one-time basis an **Account Opening Application**.

The application process will be relatively quick and easy to complete, and once your account is approved, **you will not be asked to submit a full application again.**

Once you have done so, you will hear back from us within two business days and you will be able to begin buying, or resume buying, Israel bonds.

**Account Opening Applications can be accessed at [israelbonds.ca/how-to-buy](http://israelbonds.ca/how-to-buy)**

*We appreciate that for many of our clients, there's more to an Israel Bond purchase than just "business as usual." We value the trust you place in us!*

### **To Buy in Person or by Mail**

- ✓ Open your account (see above)
- ✓ Complete and print this investment form
- ✓ Use a separate form for each registered owner
- ✓ Remit payment with completed forms via mail or in person to your nearest Israel Bonds office
- ✓ Payment Methods:
  - cheque
  - bank draft
  - money order
  - wire transfer

### **To Open Your Account and Buy Online (For Individuals Only):**

- ✓ Online sales site is for new purchases of Israel bonds only.
- ✓ FOR REINVESTMENTS of the proceeds of maturing bonds or for purchasing bonds through a brokerage account or retirement account (Cash Accounts, RRSPs, TFSAs, etc.), call the number below or email our help line.

**1.866.543.3351**  
**[helpdesk@israelbonds.ca](mailto:helpdesk@israelbonds.ca)**

### **Israel Bonds offices:**

**NATIONAL TOLL-FREE: 1.866.543.3351**

TORONTO & GTA | 801-1120 Finch Ave W Toronto ON M3J 3H7 | 416.789.3351 [toronto@israelbonds.ca](mailto:toronto@israelbonds.ca)

MONTREAL & QUEBEC REGION | 690-3500 de Maisonneuve W Montreal QC H3Z 3C1 | 514.482.0427 [montreal@israelbonds.ca](mailto:montreal@israelbonds.ca)

OTTAWA & ATLANTIC CANADA | 204-2255 Carling Ave Ottawa ON K2B 7Z5 | 613.792.1142 [ottawa@israelbonds.ca](mailto:ottawa@israelbonds.ca)

ALBERTA | 801-1120 Finch Ave W Toronto ON M3J 3H7 | 403.910.5575 [calgary@israelbonds.ca](mailto:calgary@israelbonds.ca)

MANITOBA | 801-1120 Finch Ave W Toronto ON M3J 3H7 | 416.789.3351 [winnipeg@israelbonds.ca](mailto:winnipeg@israelbonds.ca)

VANCOUVER | 304A-950 West 41<sup>st</sup> Ave Vancouver BC V5Z 2N7 | 604.266.7210 [vancouver@israelbonds.ca](mailto:vancouver@israelbonds.ca)



# Investment Form/Managed Accounts

israelbonds.ca

**IMPORTANT:**

Email or fax completed form to: **brokerageorders@israelbonds.ca 416.789.2235**

For Montreal & Quebec Region, email or fax completed form to:

**brokerageordersmtl@israelbonds.ca 514.482.9640**

ATTN: Brokerage Orders

Campaign
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CISL Account No:
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## 1. Dealer firm

Firm Name			
Address	City	Province	Postal code
<b>Investment advisor</b> Name(s)			RR code
Title		Email address	
Phone		Fax	
<b>Sales assistant</b> Name(s)		Title	
Email address		Phone	Fax
<b>Clearinghouse</b> Firm Name			
Address	City	Province	Postal code
Registered plan type <input type="radio"/> RRSP <input type="radio"/> RESP <input type="radio"/> RRIF* <input type="radio"/> TFSA <input type="radio"/> Cash Account <input type="radio"/> LIRA <input type="radio"/> IPP <input type="radio"/> RDSP <input type="radio"/> LIF		Registered plan account number	

Please make ALL payments payable directly to: STATE OF ISRAEL  
 \*Israel bonds must be held until maturity. Israel Bonds does not give tax or investment advice. Consult your Advisor/Financial Planner about your RRIF withdrawal limitations.

## 2. Client information Canada-Israel Securities, Limited can only accept orders from Canadian residents

<input type="radio"/> Mr. <input type="radio"/> Mrs. <input type="radio"/> Dr. <input type="radio"/> Ms. <input type="radio"/> Miss <input type="radio"/> Master <input type="radio"/> Rabbi <input type="radio"/> Organization			
Name(s)			
Address	City	Province	Postal code
Home phone	Mobile phone	Business phone	Fax
Email address			

## 3. I would like to purchase For current rates, terms and conditions, visit [israelbonds.ca/rates](http://israelbonds.ca/rates)

Instrument	Years to Maturity (Check one box only)						Total
	1	2	3	5	10	15	
<b>JUBILEE ISSUE BONDS</b> \$25,000 minimum with \$5,000 increments available within one year of initial purchase.	CAD \$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$
	USD \$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$
<b>MACCABEE BONDS</b> \$5,000 minimum with \$500 increments available within one year of initial purchase.	CAD \$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$
	USD \$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$
<b>SABRA BONDS – 1 Year</b> \$5,000 minimum with \$500 increments available only at time of purchase. CAD \$: Maximum allowable amount purchased by one purchaser per rate period is \$1,000,000.	CAD \$	<input type="checkbox"/>					\$
<b>SABRA BONDS – 3 Year</b> \$1,000 minimum with \$100 increments available only at time of purchase.	CAD \$	<input type="checkbox"/>					\$
	USD \$	<input type="checkbox"/>					\$
<b>MAZEL TOV BONDS</b> \$100 minimum with increments of \$10 at time of purchase. Max \$2,500 per purchaser per holder per month.	CAD \$				<input type="checkbox"/>		\$
	USD \$				<input type="checkbox"/>		\$
Total purchase amount CAD \$:							\$
Total purchase amount USD \$:							\$

## 4. Privacy consent

By submitting personal information to Israel Bonds/Canada-Israel Securities, Limited, you agree to the collection, use, retention and disclosure of such personal information for the purposes described in our Privacy Policy available at [israelbonds.ca/privacy](http://israelbonds.ca/privacy)

**Canada-Israel Securities, Limited (CISL)/Israel Bonds is registered as an Exempt Market Dealer, whose primary regulator is the Ontario Securities Commission and securities regulators/securities regulating authorities in other Provinces and Territories of Canada.** Israel Bonds are issued by the State of Israel. Israel bonds must be held to maturity. This is not an offering. Investment amounts, interest rates and maturities available on Israel bonds vary based on current offerings by the State of Israel. Rates, terms and bond issues listed and/or advertised are subject to change or may be discontinued without notice. This does not constitute tax advice. Please consult with your financial/tax advisor should you have any tax-related questions. As with any part of your financial plan, you should always consult with your financial advisor to ensure the plan is suitable for your situation. Buy, Build, Believe; Invest in Your Values; TopBond; Promise of a Bond, RRSPromise; Young Builders of Israel and Because Values Matter are all registered trademarks of CISL; which disclaims the right to the exclusive use and registration of the Crest of Israel. E/OE May 1, 2021