



4 October 2018

## Introducing effortless digital investing with HSBC Wealth Compass™<sup>1</sup>

HSBC is once again making financial services simpler, faster and better with the introduction of HSBC Wealth Compass, a new, cost-effective way to receive advice and invest online, starting with as little as \$500.

In just a few clicks, customers answer simple questions to determine their investor profile and our new digital platform immediately recommends a suitable investment.

**Larry Tomei, Executive Vice President and Head of Retail Banking and Wealth Management at HSBC Bank Canada** said: “We’ve designed HSBC Wealth Compass for customers who want a hassle-free way to start investing in their future, from the comfort of their home, with the reassurance of knowing the recommendations are reviewed by qualified professionals. Investing online doesn’t mean you need to do it alone.”

- Investment options include five new globally diversified HSBC Wealth Compass Funds<sup>2</sup> that invest in passive funds and ETFs<sup>3</sup>.
- Costs are kept low through the use of ETFs and automatic rebalancing.
- These funds are designed to meet medium- to long-term investment goals and are currently available for individual non-registered, RSP and TFSA accounts. Additional account types will be offered in the future.
- Help is available every step of the way through live chat or phone.
- For a limited time, new accounts opened online through HSBC Wealth Compass with a minimum of \$1,500 can receive a \$100 bonus.<sup>4</sup>

HSBC Wealth Compass is the latest addition to HSBC’s full suite of wealth management products and services.

“Whether you want the white glove treatment, full flexibility to invest in the markets directly when and how you want, access to HSBC’s investment funds, or the simplicity of this new online service, HSBC has you covered,” **added Mr. Tomei.**

Want to see HSBC Wealth Compass in action? Watch the demo [here](#).

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**Notes to editors:**

1. <sup>TM</sup> HSBC Wealth Compass is a trademark of HSBC Group, used under license by HSBC Investment Funds (Canada) Inc. Find it here: [www.hsbc.ca/wealthcompass](http://www.hsbc.ca/wealthcompass).
2. See HSBC Wealth Compass Fund descriptions, including strategic asset allocations and underlying funds, here: <https://www.hsbc.ca/1/2/personal/investing/products-and-services/hwc-funds>
3. Maximum management expense ratios (MER) range from 0.9% to 1.0%. The MER is the total management and operating expenses (excluding brokerage commissions on securities transactions and foreign withholding taxes) of each fund expressed as a percentage of the average net asset value of that fund for that year. Please see the prospectus, Fund Facts, and other disclosure documents for further details.
4. Offer valid until 31 October 2018. Subject to terms and conditions. See full details: [https://www.hsbc.ca/1/content/canada4/pdfs/personal/2018\\_HSBC\\_Wealth\\_Compass\\_HIFC\\_Bonus\\_Offer.pdf](https://www.hsbc.ca/1/content/canada4/pdfs/personal/2018_HSBC_Wealth_Compass_HIFC_Bonus_Offer.pdf)
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6. HSBC Global Asset Management, the investment management business of the HSBC Group, invests on behalf of HSBC's worldwide customer base of retail and private clients, intermediaries, corporates and institutions through both segregated accounts and pooled funds. HSBC Global Asset Management connects HSBC's clients with investment opportunities around the world through an international network of offices in around 26 countries, delivering global capabilities with local market insight. As at 30 June 2018, HSBC Global Asset Management managed assets totalling US\$463bn on behalf of its clients. For more information see [www.global.assetmanagement.hsbc.com](http://www.global.assetmanagement.hsbc.com). HSBC Global Asset Management is the marketing name for the asset management businesses of HSBC Holdings plc.
7. HSBC Global Asset Management (Canada) Limited is the manager and primary investment advisor for the HSBC Mutual Funds. HSBC Investment Funds (Canada) Inc. is the principal distributor of the HSBC Mutual Funds. Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments. Please read the Fund Facts before investing. Mutual funds are not guaranteed or covered by the Canada Deposit Insurance Corporation, HSBC Bank Canada, or any other deposit insurer. Their values change frequently and past performance may not be repeated. The unit value of money market funds may not remain constant.

**HSBC Bank Canada**

HSBC Bank Canada, a subsidiary of HSBC Holdings plc, is the leading international bank in the country. We help companies and individuals across Canada to do business and manage their finances internationally through three global business lines: Commercial Banking, Global Banking and Markets, and Retail Banking and Wealth Management. Canada is a priority market for the HSBC Group – one of the world's largest banking and financial services groups with assets of US\$2,607bn at 30 June 2018. Linked by advanced technology, HSBC serves customers worldwide through an international network of around 3,800 offices in 66 countries and territories in Europe, Asia, North and Latin America, and the Middle East and North Africa.

For more information visit [www.hsbc.ca](http://www.hsbc.ca) or follow us on Twitter: @hsbc\_ca or Facebook: @HSBCCanada

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