

# Olympia Trust - How to Open a New Account

## Step 1:

Login to your investor client portal to select and open the required self-directed account.

The screenshot shows the 'Account Application' page of the Olympia Trust Company. On the left is a sidebar with the company logo and three menu items: 'Accounts', 'Online Transactions', and 'Forms And Resources'. The main area is titled 'Account Application' and features four large buttons for different account types: 'Retirement Savings Plan' (blue icon), 'Tax-Free Savings Account' (purple icon), 'Retirement Income Fund' (green icon), and 'Non-Registered Account' (grey icon).

## Step 2:

Complete the account specific details as required. On the *Third-Party Access* page, enter **HOSPER** to search and authorize **Hosper Mortgage Investment Corporation** with access to your self-directed account details.

The screenshot shows the 'Third Party Access' page within the 'RRSP' section of the client portal. A progress bar at the top indicates the steps: 'Estate Beneficiary' (completed), 'Third Party Access' (current), 'Fees', 'Declaration of Trust', and 'Summary'. A 'CANCEL APPLICATION' button is in the top right. The main content area is titled 'Third Party Access' and includes explanatory text about the feature. Below the text is a search field with 'HOSPER' entered and a red 'SEARCH' button. A table titled 'Authorized Parties' shows the search results:

Description	Agent Type	Status	
HOSPER MORTGAGE INVESTMENT CORPORATION	Issuer	New	

A '> NEXT STEP' button is located at the bottom right of the page.

## Step 3:

Review and confirm your agreement with the **Declaration of Trust** and **Terms and Conditions**.

The screenshot shows the final confirmation step. It features two checked checkboxes: 'I Accept the Terms & Conditions' and 'I Agree to the Declaration of Trust'. At the bottom left is a '< PREV STEP' button, and at the bottom right is a '> NEXT STEP' button.

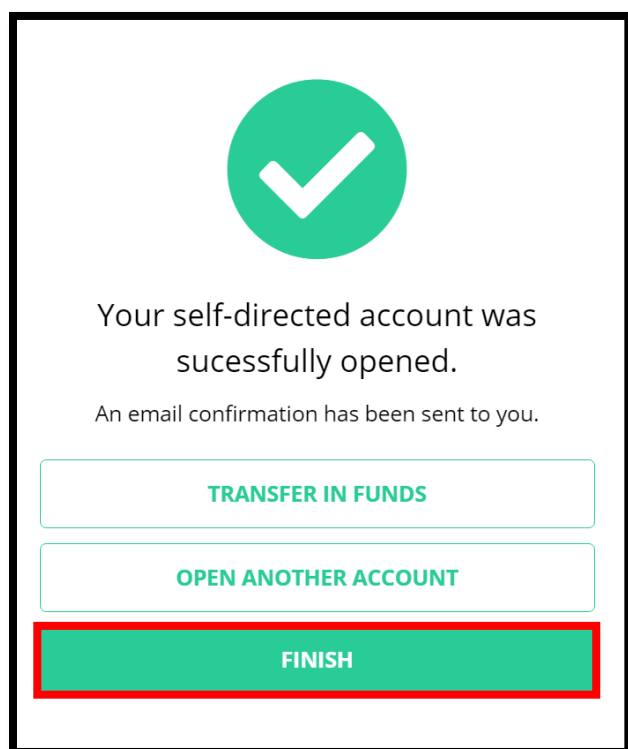
#### Step 4:

Click **SIGN DOCUMENT** to sign the required documents and activate your self-directed account.



#### Step 5:

After submitting the signed document you will receive a dialog box and an email confirming that your account has been successfully opened. Click **Finish**.



## You're done!