

## HSBC Invest – How to Open an HSBC Invest Account Transcript

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Welcome to HSBC Invest. Here's a simple guide to take you through how to open an HSBC Invest Account in just a few minutes, giving you access to our award-winning research and tools. Currently known as HSBC Online Share Trading, the name is changing in 2022, to better reflect the range of investment options now available to you.

VO: To open an account, you'll need 3 things handy:

1. your Australian Driver's license or passport
2. your bank account details, and
3. your Tax File Number.

VO: Also, if you already have a share trading account elsewhere and are switching to HSBC Invest, make sure you also have your Holder Identification Number (HIN) handy. You can find the HIN on a recent CHESS statement.

VO: Now let's head over to the HSBC website and navigate through to the Investing tab.

Click on HSBC Invest and scroll down to 'Apply Now'.

VO: If you are an existing HSBC customer, simply click log on and apply and you will be taken to an express application form which will be pre-populated so you will just need to provide the purpose of the account and create a username.

VO: For new customers please click on Apply now

VO: Now you can select if you are opening an account just for you or in joint names.

VO: And then click to confirm you aren't already an existing customer with online banking

VO: Complete your name, ensuring it matches your Driver's licence or passport.

VO: Then choose and enter a username for your HSBC Invest account. Make sure to write this down for safekeeping. Once you have entered your desired username as well as your email address and phone number, select 'Check availability' to make sure your username isn't already taken and that we don't already have a previous registration for you.

VO: Then, enter basic details including your email and date of birth. Review and agree to the HSBC Privacy Policy and Electronic Communication Consent then hit save and continue

VO: Next, you will need to enter an address that is not a PO Box

VO: Now tell us a little about you including your place of birth, nationality and tax residence

VO: Then enter your Tax File Number. This is so tax won't automatically be deducted at the highest marginal tax rate on any dividend or coupon distributions. You will also need to confirm if you have a tax file exemption if you are a tax resident of another country.

VO: Now we need some details about your employment including your employment status and employer.

VO: Next, provide your Australian Passport or Australian Driver's licence details so we can verify your identity. If we cannot verify you electronically, we'll need you to send us a certified copy of your ID either by email or you can send it in the post. Alternatively you can verify your identity using digital facial recognition at the end of this application.

VO: Great. Now its time to set up your account. Select the main reason for opening the account e.g. Savings or Investment and tell us how you will deposit funds into the account as well as the source of funds.

VO: Now, let's review the application and review the acknowledgements. You can edit any of the fields if any of the details are incorrect. Once you have reviewed the terms and conditions and legal offer documents click "I agree" and then submit your application. You also have the option to print it.

VO: Congratulations you have successfully submitted your application for a HSBC Invest package. If we have not been able to verify you electronically, you will need to send us a certified copy of your ID either by email or you can send it in the post. Alternatively, you can verify your identity using digital facial recognition.

VO: Once your identity has been verified you will receive an email confirmation that your HSBC Invest application was successfully submitted. This email will also include a declaration form which needs to be printed, signed and returned. The physical form does not need to be returned, you may simply sign the declaration, take a photo of it on your smartphone and email it to the HSBC Invest customer support team: [support@sharetrading.com.au](mailto:support@sharetrading.com.au) with a photo of your Australian drivers licence or passport.

VO: We will then open your trading account. You will also receive an auto-generated email to set up your account password.

VO: Then look out for your Welcome email. It will guide you through all the features and tools available on the platform, including how to transfer shares or a portfolio to HSBC Invest. It will also show you how to set up 'single sign on' to let you access HSBC Invest from HSBC Online Banking.

VO: That's it! customer service team will be in touch once your account is ready so you can start investing using our award-winning research and tools.

VO: If you have any questions, you can also call us 1300 782 811, or chat to us online.

VO: HSBC Invest. Your one platform to invest online.