



## HSBC Personal Account Application (For new/additional accounts and updating of customer details)

Please complete the form in BLOCK LETTERS

## 1. PERSONAL DETAILS - This section MUST be completed for NEW customers

APPLICANT 1		APPLICANT 2	
Existing customer		Existing customer	
No 🗌		No 🗌	
Yes Specify customer		Yes Specify customer	
number & update customer details		number & update customer details	
Title First name(s)		where necessary   Title First name(s)	
Title First name(s)		Title First name(s)	
			5
Family name	Date of birth DD/MM/YY	Family name	Date of birth DD/MM/YY
Former/other names		Former/other names	
	onality		onality
Male Female		Male Female	
Identification: Passport No.		Identification: Passport No.	
Residential address (where you li	ive)	Residential address (where you live)	
	Postcode		Postcode
Country (if not		Country (if not	
New Zealand)  (complete if your principal residence is different to the		New Zealand) (complete if you	our principal residence is different to the
Permanent address residential add	(ress above)	Permanent address residential add	Iress above)
	Postcode		Postcode
Country (if not New Zealand)		Country (if not New Zealand)	
Correspondence address – Write 'a	as above' if the same as your residential address	Correspondence address – Write	'as above' if the same as your residential address
	Postcode		Postcode
Country (if not		Country (if not	
New Zealand)		New Zealand)	
Welcome Pack: Collect at 1 Queen		Welcome Pack: Collect at 1 Queen	Street Send to Correspondence Address Work phone number
Home phone number	Work phone number	Home phone number	/ \
	NA shill and have a second beautiful.	Faces	Malaila a kanananan kan
Fax number	Mobile phone number	Fax number	Mobile phone number
	( )	( )	( )
Email address		Email address	
Are you self-employed or a business owner? No Yes		Are you self-employed or a bus	
If yes – details of business acti	vity	If yes – details of business act	ivity
Occupation	Job title	Occupation	Job title
Employer's name		Employer's name	
Length of employment there	years months	Length of employment there	years months
Annual personal income	yours months	Annual personal income	yours
Below \$50,000 (1)	\$50,000 - \$99,999 (2)	Below \$50,000 (1)	\$50,000 - \$99,999 (2)
\$100,000 - \$149,999 (3)	\$150,000 - \$199,999 (4)	\$100,000 - \$149,999 (3)	\$150,000 - \$199,999 (4)
\$200,000 - \$249,999 (5)	Above \$250,000 (6)	\$200,000 - \$249,999 (5)	Above \$250 000 (6)

Primary Source   Salary   Superannation   Investment   Dependent on   Dependent						
this account with HSBC was recommended by a friend or family member I have banked with HSBC overseas I saw one of HSBC's ads I received some promotional material from HSBC I attended an HSBC event I HSBC offers a service I require HSBC offers a service I require HSBC offers a service I require HSBC offers me the level of service I'm looking for Other reasons (please specify)  2. INLAND REVENUE APPLICANT 1  Are you a resident of New Zealand for tax purposes? No   Yes (Please provide IRD Number below)   IRD Number   If no, which tax application have you elected? Approved Issuer Lovy*   or Non Resident Withholding Tax   In what country are you a resident for tax purposes if not New Zealand?  If you are a New Zealand Resident, which tax rate do you want to apply to your deposits?  If you are a New Zealand Resident, which tax rate do you want to apply to your deposits?  If you are a New Zealand Resident, which tax rate do you want to apply to your deposits?  If you are a New Zealand Resident, which tax rate do you want to apply to your deposits?  Account ReQUIREMENTS  Types of Expectad Telegraphic Cash to consider of as demonsted by New Zealand Resident, which tax rate do you want to apply to your deposits?  Account Type Online Savings Account   Savings Cheque   Other   Specify   Account Type Online Savings Account   Savings Cheque   Other   Specify   Account Access Telephone Banking   Internet Banking   ATM   Account Access Telephone Banking   Internet Banking   ATM   Account Access Telephone Banking   Internet Banking   ATM   Account Access Telephone Internet and ATM access a not available if more than one signatory are required. ATM access is only available to you good book is only available to with the Savings Cheque account. If you require a						
Law one of HSBC's ads   Law one of HSBC offers a service I require   HSBC offers a service I r	1	• • • • • • • • • • • • • • • • • • • •				
Isaw one of HSBC's ads   Ireceived some promotional material from HSBC   Ireceived some promotional material from HSBC   Ireceived some promotional material from HSBC   Internet data on HSBC event   Isatended an HSBC event	I was recommend	ed by a friend or family member	I was recommended by a friend or family member			
Ireceived some promotional material from HSBC   I attended an HSBC event   HSBC offers a service I require   HSBC offers a service I require I HSBC offers a service I require	I have banked wit	h HSBC overseas	·			
attended an HSBC event   HSBC offers a service   require   HSBC' services are well priced   HSBC offers me the level of service I'm looking for	I saw one of HSB0	C's ads	I saw one of HSBC's ads			
HSBC offers a service I require HSBC's services are well priced HSBC offers me the level of service I'm looking for Other reasons (please specify)  2. INLAND REVENUE APPLICANT 1 Are you a resident of New Zealand for tax purposes? No	I received some p	romotional material from HSBC	I received some promotional material from HSBC			
HSBC's services are well priced  HSBC offers me the level of service I'm looking for  Other reasons (please specify)  2. INLAND REVENUE APPLICANT 1  Are you a resident of New Zealand for tax purposes?  No	I attended an HSB	C event	·			
HSBC's services are well priced  HSBC offers me the level of service I'm looking for  Other reasons (please specify)  2. INLAND REVENUE APPLICANT 1  Are you a resident of New Zealand for tax purposes?  No	HSBC offers a serv	vice I require	HSBC offers a service I require			
HSBC offers me the level of service I'm looking for Other reasons (please specify)			·			
Other reasons (please specify)   Other reasons (please specify)	HSBC offers me th	ne level of service I'm looking for	HSBC offers me the level of service I'm looking for			
APPLICANT 1  Are you a resident of New Zealand for tax purposes?  No	_					
No   Yes (Please provide IRD Number below)   IRD Number	APPLICANT 1					
If no, which tax application have you elected? Approved Issuer Levy*						
Approved Issuer Levy*	IRD Number		IRD Number			
Non Resident Withholding Tax	If no, which tax a	pplication have you elected?	If no, which tax application have you elected?			
In what country are you a resident for tax purposes if not New Zealand?    If you are a New Zealand Resident, which tax rate do you want to apply to your deposits?   10.5%	Approved Issuer I	Levy* or	Approved Issuer Levy* or			
If you are a New Zealand Resident, which tax rate do you want to apply to your deposits?  10.5%	Non Resident Wit	hholding Tax	Non Resident Withholding Tax			
want to apply to your deposits?  10.5%						
want to apply to your deposits?  10.5%						
*Customers who are not New Zealand tax residents will have Non Resident Withholding Tax ("NRWT") deducted from interest payments. The rate deducted will be determined by the country the customer is a tax resident of as determined by New Zealand Tax law. Non resident customers may also elect to have Approved Issuer Levy (AIL) applied at 2% of interest payments. AIL is not a tax deducted from interest payments but a levy paid by HSBC. If AIL is elected the interest rate received on investment may be reduced by 0.25%.  3. ACCOUNT REQUIREMENTS  Types of Expected Telegraphic Cash Deposit Withdrawals Cheque Deposits Issued Transfer in/out Other (please specify)  Other (please specify)  Other (please specify)  Overall purpose of account Savings Cheque Other (Specify)  Multicurrency*  Amount Opening Deposit Source and Description of Deposit  *Multicurrency accounts are available in the following currencies: AUD, NZD, USD, GBP, EUR, CAD, JPY, HKD, SGD and CHF. If you don't choose a currency, the default will be NZD.  Type of Statement Composite (all accounts in one statement) Separate statement (one per account) eStatement (composite statement only)  Estatement (composite statement only) Terequency Monthly Quarterly Half Yearly  Account Access Telephone Banking Internet Banking ATM  Telephone, Internet and ATM access are not available if more than one signatory are required. ATM access is only available for accounts in New Zealand dollars. A cheque book is only available with the Savings Cheque account. If you require a	want to apply to your deposits?		want to apply to your deposits?			
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Account Type Online Savings Account Savings Cheque Other (Specify)  Multicurrency*  *Multicurrency accounts are available in the following currencies: AUD, NZD, USD, GBP, EUR, CAD, JPY, HKD, SGD and CHF. If you don't choose a currency, the default will be NZD.  Type of Statement Composite (all accounts in one statement) Separate statement (one per account) eStatement (composite statement only) Frequency Monthly Quarterly Half Yearly  Account Access Telephone Banking Internet Banking ATM  Telephone, Internet and ATM access are not available if more than one signatory are required. ATM access is only available for accounts in New Zealand dollars. A cheque book is only available with the Savings Cheque account. If you require a	3. ACCOUNT RE	QUIREMENTS				
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Online Savings Account Savings Cheque Other (Specify)  Multicurrency* Source and Description of Deposit  * Multicurrency accounts are available in the following currencies: AUD, NZD, USD, GBP, EUR, CAD, JPY, HKD, SGD and CHF. If you don't choose a currency, the default will be NZD.  Type of Statement Composite (all accounts in one statement) Separate statement (one per account) eStatement (composite statement only) Frequency Monthly Quarterly Half Yearly  Account Access Telephone Banking Internet Banking ATM  Telephone, Internet and ATM access are not available if more than one signatory are required. ATM access is only available for accounts in New Zealand dollars. A cheque book is only available with the Savings Cheque account. If you require a		Overall purpose of account				
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## 4. IMPORTANT INFORMATION AND CUSTOMER DECLARATION

I/We

- confirm that I/We have been given a copy of the Personal Financial Services Terms and Conditions, and the Personal Financial Services Fees and Charges guide, and agree that these will apply to all my/our bank accounts opened both now and in the future;
- confirm that I/we have been given a copy of the HSBC Investment Statement for Term Deposits and acknowledge that I/we
  have read or will read the important information contained in the Investment Statement prior to investing in an HSBC Term
  Deposit;
- acknowledge that my/our personal information may be collected, used, stored and disclosed by HSBC (including its related companies in other countries) and other third parties for the purposes and upon the terms set out in the Privacy Act 1993/ Personal Information and Exchange of Customer Information section of the Personal Financial Services Terms and Conditions;
- understand that if I/we are either a non resident and/or have elected to utilise the Multi Currency Account facility and/or wish to send instructions to you by phone or facsimile then the relevant sections of the Personal Financial Services Terms and Conditions apply (including certain indemnities and risks involved with investing in foreign currencies); and
- confirm that the information disclosed in this application form is a true and accurate record of my/our personal details and current financial position.

5. AUTHORISATION			
Signing instructions			
	Signatories jointly _		
Other (applicable if more than two applicants)	(specify)		
APPLICANT 1		APPLICANT 2	
Name of Applicant 1	Date	Name of Applicant 2	Date
Signature of Applicant 1		Signature of Applicant 2	
	(SV)		(SV)
I would like to receive information on other HSBC products and services (including via email)	No Yes	I would like to receive infor other HSBC products and s (including via email)	mation on
Customer documentation checklist			
This application completed Proof of identity form (if applicable)	Passport Power of attorne	identification ey (if applicable) In	Proof of address*  vestment Statement Received
*Verification must be less than three months old and co	enfirm customer's resident	ial address (and permanent address	if applicable).
BANK USE ONLY Additional comments			
Customer number			
Account Officer's name & number		Branch	
Authorised signature (bank staff authorised to op	en accounts)	Date	
		GHO Code	

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