

PERSONAL DETAILS – This section MUST be completed for NEW customers

APPLICANT 1

Existing customer

No Yes Specify customer no. & update customer details where necessary

Title First name(s) (include any other names used)

Family name Date of birth DD/MM/YY

Gender Male Female Nationality

Identification: Passport No.

Residential address (where you live)
Postcode
 Country (if not New Zealand)

Postal address – Write 'as above' if the same as your residential address
Postcode
 Country (if not New Zealand)

Are you a resident of New Zealand for tax purposes? No Yes

Home phone number () Work phone number ()

Fax number () Mobile phone number ()

Email address

Are you self-employed or a business owner? No Yes

If yes – details of business activity

Occupation Job title

Employer's name

Length of employment there years months

Annual personal income
 Below \$25,000 (1) \$25,000 – \$49,999 (2)
 \$50,000 – \$69,999 (3) \$70,000 – \$99,999 (4)
 \$100,000 – \$149,999 (5) Above \$150,000 (6)

Name of Credit Cards you use VISA Mastercard Other (please specify)

Primary Source of Income Salary/Drawings WINZ Payments Student Allowances Superannuation Payments Investment Income

Types of Expected Account Activity Telegraphic Transfer in/out Cash Deposit Cash Withdrawals Cheque Deposits Cheques Issued Transfer in/out

APPLICANT 2

Existing customer

No Yes Specify customer no. & update customer details where necessary

Title First name(s) (include any other names used)

Family name Date of birth DD/MM/YY

Gender Male Female Nationality

Identification: Passport No.

Residential address (where you live)
Postcode
 Country (if not New Zealand)

Postal address – Write 'as above' if the same as your residential address
Postcode
 Country (if not New Zealand)

Are you a resident of New Zealand for tax purposes? No Yes

Home phone number () Work phone number ()

Fax number () Mobile phone number ()

Email address

Are you self-employed or a business owner? No Yes

If yes – details of business activity

Occupation Job title

Employer's name

Length of employment there years months

Annual personal income
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OPTIONAL PERSONAL DETAILS

The information requested in this section is additional to that required to open your account. It is optional for you to provide this information. If you do provide responses to some or all of the questions shown below, HSBC will keep this information on file and it will be treated as private and confidential. This information will only be used by HSBC to understand customer segments in more detail and to provide you with information and promotional offers that are relevant to your situation.

APPLICANT 1

Preferred language

Education level

Secondary (3) Graduate (6) Post graduate (5)

Marital status

Single (1) Married (2) De-facto (5)

Number of dependant children

Annual household income

Below \$25,000 (1) \$25,000 – \$49,999 (2)
 \$50,000 – \$69,999 (3) \$70,000 – \$99,999 (4)
 \$100,000 – \$149,999 (5) Above \$150,000 (6)

Home ownership

Rent/Board (1) Home has mortgage (3)
 Own home (4) Living with parents/relatives (5)

Do you own a motor vehicle?

No Yes

Which bank do you consider to be your main bank?

Banks where other accounts are held

Bank	Branch

Please indicate the main reason you chose to open this account with HSBC - Tick (✓) one answer only

Recommendation by friend/family (1)
 Banked with HSBC in another country (2)
 Response to advertising (3)
 Dissatisfaction with previous bank (4)
 Convenient location of bank (5)
 Employer's bank for salary payment (6)
 Price related reasons (7)
 Service related reasons (8)
 Other (9)

APPLICANT 2

Preferred language

Education level

Secondary (3) Graduate (6) Post graduate (5)

Marital status

Single (1) Married (2) De-facto (5)

Number of dependant children

Annual household income

Below \$25,000 (1) \$25,000 – \$49,999 (2)
 \$50,000 – \$69,999 (3) \$70,000 – \$99,999 (4)
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No Yes

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 Employer's bank for salary payment (6)
 Price related reasons (7)
 Service related reasons (8)
 Other (9)

Thank you for taking the time to complete these Optional Personal Details

TAX FILE NOTIFICATION NUMBER

APPLICANT 1

IRD Number

If you are a New Zealand Resident, which tax rate do you want to apply to your deposits? 19.5% 33% 39%

APPLICANT 2

IRD Number

If you are a New Zealand Resident, which tax rate do you want to apply to your deposits? 19.5% 33% 39%

TRANSACTION ACCOUNT DETAILS – Please tick

Account Type	Online Savings	Cash Management	Savings Cheque	Standard Savings	MultiCurrency
Type of currency (AUD, HKD, USD, GBP, EUR, CAD, JPY, NZD)	NZD	NZD	NZD	NZD	
Deposit amount					
Source and description of funds					
Type of statement required	<input type="checkbox"/> Composite statement <small>(i.e. one single statement showing all your accounts)</small>		<input type="checkbox"/> Regular statement <small>(i.e. a separate statement for each account)</small>		
Telephone and internet banking#	YES <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Deposit book*	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>	
Cheque book*	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>		
ATM card#	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>		
	Name on card (App 1)	<input type="text"/>			
	Name on card (App 2)	<input type="text"/>			
Internet Banking Third Party Transfer Limit**	No <input type="checkbox"/> Yes <input type="checkbox"/>				

Telephone and internet banking and / or ATM card access are not available if more than one signature is required to operate a joint account.

* Deposit and / or cheque books and / or ATM cards are not available for accounts in foreign currencies.

** Only available if you opt for Internet banking facility. A limit will be loaded if you select yes to this option.

TERM DEPOSIT DETAILS

Amount of term deposit Currency of term deposit NZD HKD USD AUD Other (specify)

The interest rate you will receive for your new term deposit will be % p.a. * * This rate is indicative and subject to change. You will receive the rate applicable on the date your account is opened.

Source and description of Funds

Interest Payment Frequency (please tick)

Term	At Maturity	Annual	Quarterly	Monthly
1 month	<input type="checkbox"/>			<input type="checkbox"/>
2 months	<input type="checkbox"/>			<input type="checkbox"/>
3 months	<input type="checkbox"/>			<input type="checkbox"/>
4 months	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
5 months	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
6 months	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
7 months	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
8 months	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
9 months	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Term	At Maturity	Annual	Quarterly	Monthly
10 months	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
11 months	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
1 year	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
15 months	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
18 months	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
2 years	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
3 years	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
4 years	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
5 years	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Interest payment frequency:

- monthly, quarterly or at maturity for terms of 12 months or less
- monthly, quarterly or annually for terms greater than 12 months

Principal instructions at maturity:

You should advise us of your instructions for dealing with your term deposit before its maturity date. If you do not, we will renew the deposit for the same term at the applicable interest rate on the date of maturity.

Re-invest for same term
 Re-invest for new term month(s) year(s)
 Credit HSBC Bank account number
 Pay by bank cheque Other

Telephone banking access Internet banking access

Interest payment instructions

Re-invest at maturity Pay by bank cheque
 Credit HSBC Bank account number
 Credit to an external account
 Name of institution Location / branch
 Account number

