

## Application details

<b>For Personal Accounts</b> To be completed by all additional applicants and when updating existing customer details		
<b>For Non Personal Accounts</b> To be completed by all additional Authorised Signatories, Directors, Shareholders, Partners, Proprietors, Trustees and Officers, and when updating existing customer details		
Existing customer	No <input type="checkbox"/> Yes <input type="checkbox"/>	<i>Specify customer number &amp; update customer details where necessary</i>
Entity's name <small>(required if non personal account)</small>		
Account name		

## Personal details

Designation <small>(required if Non Personal Account)</small>	Director <input type="checkbox"/>	Shareholder <input type="checkbox"/>	Partner <input type="checkbox"/>
	Proprietor <input type="checkbox"/>	Trustee <input type="checkbox"/>	Guarantor <input type="checkbox"/>
	Other (specify) <input type="checkbox"/>		
Title			
First name(s)			
Last name			
Former / other name(s)			
Date of Birth			
Gender	Male <input type="checkbox"/>	Female <input type="checkbox"/>	
Nationality			
ID type			
ID number			
Home phone number			
Work phone number			
Mobile number			
Fax number			
Email address			
Residential address			
Permanent address <small>(if different from residential address above)</small>			
Correspondence address <small>(if different from residential address above)</small>			
Are you self employed?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Name of employer / business			
Occupation / nature of business			
Position held			
Time at this employment	Years	Months	

## Tax details (for personal applicants only)

IRD number			
Are you a resident of New Zealand for tax purposes?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
If yes, tax rate to apply (for personal customers only)	10.5% <input type="checkbox"/>	17.5% <input type="checkbox"/>	30% <input type="checkbox"/> 33% <input type="checkbox"/>
If no, which tax application have you selected?	Approved Issuer Levy* <input type="checkbox"/>		Non Resident Withholding Tax <input type="checkbox"/>

\* 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 will be reduced by 0.25%.

## Account access (if applying as an additional party on an account)

ATM Card* (NZD account only)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Level of access (for non personal account)	Enquiry only <input type="checkbox"/>	Full access <input type="checkbox"/>
Telephone and Internet Banking*	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Limits (if full access requested. Default is zero if no limit entered)		
* ATM / Telephone and Internet Banking facilities are not available if signing instructions are jointly.			Third Party Transfer	\$ maximum \$10,000 per day	
			Linked Account Transfer	\$ maximum \$50,000 per day	
			Bill Payment	\$ maximum \$10,000 per day	

## Annual personal income (for personal applicants only)

Below \$50,000 (1) <input type="checkbox"/>	\$50,000 – \$99,999 (2) <input type="checkbox"/>	\$100,000 – \$149,999 (3) <input type="checkbox"/>			
150,000 – \$199,999 (4) <input type="checkbox"/>	\$200,000 – \$249,999 (5) <input type="checkbox"/>	Above \$250,000 (6) <input type="checkbox"/>			
Primary source of income (for personal customers)	Salary / drawings <input type="checkbox"/>	Superannuation payments <input type="checkbox"/>	Investment income <input type="checkbox"/>	Dependent on family members <input type="checkbox"/>	Other (please specify) _____

## Customer documentation checklist

This application completed <input type="checkbox"/>	Proof of address <input type="checkbox"/>	Identification document <input type="checkbox"/>
Other (specify) _____		

Note: Identification and proof of address is required for all Authorised Signatories, Directors, Principal Shareholders, Partners, Proprietors, Trustees, Settlers, Guarantors, Protectors and Officers.

Address verification must be less than three months old and confirm customer's residential address and permanent address, if different from residential address.

## Important information and customer declaration

- I,
- confirm that I have been given a copy of the Personal Financial Services Terms & Conditions, HSBC Premier Service Guide (if applicable, and includes the HSBC Premier Terms and Conditions) and the Retail Banking and Wealth Management Fees and Charges guide and agree these terms and conditions will apply to all my bank accounts opened both now and in the future;
  - confirm that I have completed and signed the Retail Banking and Wealth Management Account Mandate (the Mandate) and accept that these terms also apply to the operation of my nominated accounts with HSBC (if applicable);
  - acknowledge that HSBC is entitled to receive instructions from Authorised Signatories in accordance with the Mandate (if applicable) and the terms contained in the Personal Financial Services Terms & Conditions;
  - where applicable acknowledge that personal information may be collected, used, stored and disclosed by HSBC (including its related companies in other countries) and other specified third parties for the purposes and upon the terms set out in the Privacy Act 1993/Personal Information section of the Personal Financial Services Terms & Conditions;
  - understand that if I wish to send instructions to you by phone or facsimile then the relevant sections of the Personal Financial Services Terms & Conditions apply.
  - confirm that I have been given a copy of the HSBC Investment Statement for Term Deposits and acknowledge that I have read or will read the important information contained in the Investment Statement prior to investing in a HSBC Term Investment;
  - confirm that the information disclosed in this Personal Details Form, is a true and accurate record of my personal details and current financial position; and
  - have been given a copy of the HSBC QFE Disclosure Statement on account opening and acknowledge that I will read the important information contained in the statement before applying for services and products with HSBC or the HSBC QFE Group.

Please note: HSBC's retail banking department is changing its name from Personal Financial Services ('PFS') to Retail Banking and Wealth Management ('RBWM'). To reflect this change, all documentation with references to 'PFS' will be replaced with 'RBWM'. During this transitional period, please note that any reference to 'RBWM' includes documentation issued under the 'PFS' name (and vice versa).

Name
Official designation:
Signature:
Date:

## Bank use only

--