

HSBC Power Vantage Customer Information Form

I. Main Account Holder

Please fill out the following in English and bring to HSBC:

Last Name: _____ First Name: _____

Mr. _____ Mrs. _____ Miss _____ Ms. _____ Other _____

Gender: Male _____ Female _____

Date of Birth (day/month/year): _____

Nationality: _____

Employment Status: Self-Employed _____ Full-time Employed _____
Part-time Employed _____ Not Currently Employed _____ Student _____
Housewife _____ Retired _____

For self-employed, full-time employed or part-time employed customers, please complete the following:

Job Nature: _____

Job Title: _____

Employment Start Date (Month/Year): _____

Employer/Business Name: _____

Employer/Business Industry: Manufacturing _____ Construction _____
Transport _____ Hotel _____ Import/Export _____ Communications _____
Real Estate _____ Personal & Household Services _____ Wholesale _____
Restaurants _____ Finance/Insurance _____ Business Services _____
Retail _____ Public Services _____ Others _____

Monthly Salary (HKD): _____

Monthly Non-Salary (HKD): _____

Education Level: Completed Secondary _____ Post-Secondary _____
University or above _____ Other _____

Marital Status: Single _____ Married _____ Divorced _____ Widowed _____

Contact Telephone Number: Home: _____

Office: _____ Mobile: _____

Contact Fax Number:

Home: _____ Office: _____

Email Address: _____

Home Address: _____

Office Address: _____

Language Preference: English _____ Cantonese _____ Putonghua _____

Number of People in Household: _____

Number of Children: _____

Year of Birth of Children: _____

Household Income (HK Dollars): Below 5,000 _____ 5,000 – 9,999 _____
10,000 – 14,999 _____ 15,000 – 19,999 _____ 20,000 – 29,999 _____
30,000 – 49,999 _____ 50,000 – 69,999 _____ 70,000 – 99,999 _____
100,000 – 199,999 _____ 200,000 or above _____

Home Status: Rented – Monthly Rent (HKD) _____

Living with Relative _____ Company Provided _____

Self-Owned (Without Mortgage) _____

Self-Owned (With Mortgage) - Monthly Mortgage Payment (HKD): _____

Other _____

Do you have a banking relationship with HSBC in another country?

Yes (please specify the main country) _____

No _____

II. Jointed Account Holder

Please fill out the following in English and bring to HSBC (same information as the main account holder):

Last Name: _____ First Name: _____

Mr. _____ Mrs. _____ Miss _____ Ms. _____ Other _____

Gender: Male _____ Female _____

Date of Birth (day/month/year): _____

Nationality: _____

Employment Status: Self-Employed _____ Full-time Employed _____

Part-time Employed _____ Not Currently Employed _____ Student _____

Housewife _____ Retired _____

For self-employed, full-time employed or part-time employed customers, please complete the following:

Job Nature: _____

Job Title: _____

Employment Start Date (Month/Year): _____

Employer/Business Name: _____

Employer/Business Industry: Manufacturing _____ Construction _____
Transport _____ Hotel _____ Import/Export _____ Communications _____
Real Estate _____ Personal & Household Services _____ Wholesale _____
Restaurants _____ Finance/Insurance _____ Business Services _____
Retail _____ Public Services _____ Others _____

Monthly Salary (HKD): _____

Monthly Non-Salary (HKD): _____

Education Level: Completed Secondary _____ Post-Secondary _____
University or above _____ Other _____

Marital Status: Single _____ Married _____ Divorced _____ Widowed _____

Contact Telephone Number: Home: _____
Office: _____ Mobile: _____

Contact Fax Number:
Home: _____ Office: _____

Email Address: _____

Home Address: _____

Office Address: _____

Language Preference: English _____ Cantonese _____ Putonghua _____

Number of People in Household: _____

Number of Children: _____

Year of Birth of Children: _____

Household Income (HK Dollars): Below 5,000 _____ 5,000 – 9,999 _____
10,000 – 14,999 _____ 15,000 – 19,999 _____ 20,000 – 29,999 _____
30,000 – 49,999 _____ 50,000 – 69,999 _____ 70,000 – 99,999 _____
100,000 – 199,999 _____ 200,000 or above _____

Home Status: Rented – Monthly Rent (HKD) _____

Living with Relative _____ Company Provided _____

Self-Owned (Without Mortgage) _____

Self-Owned (With Mortgage) - Monthly Mortgage Payment (HKD): _____

Other _____

Do you have a banking relationship with HSBC in another country?

Yes (please specify the main country) _____

No _____

III. Investment Account Questionnaire

Please fill out the following information in English if you wish to use your Power Vantage account to buy/sell stocks, bonds, or other investments:

Types of product(s) you have previously invested (please choose one or more):

Bonds/CD _____ Stocks _____ Unit Trusts _____ Futures & Options _____

Derivatives _____ None _____

Years of Investment Experience: Less than 1 year _____ 1 – 4 years _____

5 – 10 years _____ More than 10 years _____

Investment Objectives: Speculation _____ Capital Appreciation _____

Regular Income _____

Financial Situation:

Less than or equal to HKD 500,000 _____ HKD500,001 to HKD1,000,000 _____

HKD1,000,001 to HKD5,000,000 _____ HKD5,000,001 or above _____

Note: HSBC may use the above investment information to market financial products to you.