



Important Information: Transfer of your HSBC Invest account to Bell Direct

As part of HSBC's closure of its retail banking business in Australia, we've been working with Third Party Platform (TPP), the provider of HSBC Invest, to make arrangements for your account and portfolio. As a result, your HSBC Invest account and portfolio will transfer to TPP's online share trading platform, Bell Direct, in the coming months.

What you need to know

- **No immediate action is required:** There's no immediate action required by you, unless you don't want to transfer to Bell Direct. HSBC and TPP will continue to share updates about the upcoming changes and any actions you need to take closer to the transfer of your account and portfolio.
- **Similar features:** The HSBC Invest online share trading platform has always been provided by TPP although it was branded HSBC. As TPP provides the technology product and services for both HSBC Invest and Bell Direct, you can expect equivalent trading features and tools after the move.
- **If you hold an HSBC WorldTrader account:** This update relates to your HSBC Invest account only. HSBC WorldTrader is a separate product and is not included in this transfer. We're currently working to make arrangements for your HSBC WorldTrader account, portfolio and cash holdings and will be in touch soon with more information.

What remains the same after transfer

- **Trade settlement process:** For now, you can continue to trade and settle from your existing linked HSBC Bank Account.
- **Your Holder Identification Number (HIN):** Your existing arrangements won't change so TPP will continue to be your sponsoring CHESS broker and you will retain your Holder Identification Number (HIN).
- **Your records will stay with you:** Your trading history, trading alerts, watchlists, open orders, cost base and reporting can be accessed on your Bell Direct account. These will be available online, or you can request them from Bell Direct Customer Support.
- **Customer Support:** The same Customer Support team you currently deal with at TPP will be available to support and answer all your queries during this change.

What you need to do

If you don't want to trade with Bell Direct

If you don't want to trade with Bell Direct, you'll need to nominate your preferred broker and submit a stock transfer request before the transfer deadline. Please share a copy of the request with the HSBC Invest Customer Support team so we can process it. We'll notify you of the transfer deadline in advance.



Stay informed

We'll continue to share updates over the coming months to help you prepare for the move to Bell Direct. You can also find the latest information on the Important Notices page of our HSBC Australia website.

Customer service

Our customer service team will remain available to support you during this transition. You can continue to self-serve through the HSBC Mobile Banking app, online banking, or your local branch.

If you need help with your HSBC Invest account, please call 1300 782 811 or +61 3 8663 2766 (from overseas).

Extra care support

If you have additional support needs, we can help:

- If English isn't your first language, just say "I need an interpreter" when you contact us. 如果英语不是您的第一语言，当您联系我们时，只需用英文说 "I need an interpreter"（意思为“我需要一名口译员”），即可获得口译服务。您也可以通过汇丰澳大利亚网站的“重要通知”（Important Notices）页面获取最新信息。
- For more information on how we can offer extra care support when you need it, please visit the Extra Care page found on our HSBC Australia website.

Yours Sincerely,

HSBC Bank Australia

Stay alert. Keep your money safe from scams.

Scammers may take this opportunity to contact you pretending to be from HSBC. As investment scams are increasing, stay alert and treat any unsolicited offers with caution — even if they look genuine.

- Be highly suspicious if you're unexpectedly asked to move money or take urgent action.
- Always use Call Verify on your HSBC mobile banking app to confirm whether the person you're speaking to is from HSBC.
- Always contact us through official channels listed on our website or through the HSBC mobile banking app.
- Never share your PIN, passwords or security codes with anyone, even if they claim to be from HSBC.



More information on Call Verify and our Fraud & Scams prevention can be found on our HSBC Australia website.