



# Your guide to using HSBC WorldTrader

We're here to help

Contact our friendly customer service team at 1300 131 605.

# How to open an HSBC WorldTrader account



Apply for HSBC WorldTrader from your HSBC Australia Mobile Banking app

Scan the QR code to apply from the HSBC Australia app.

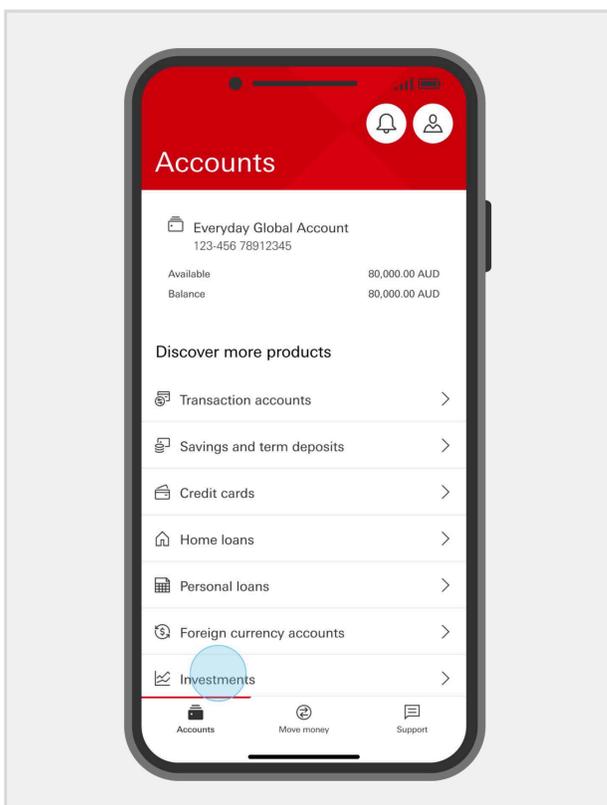


To be eligible, you must:

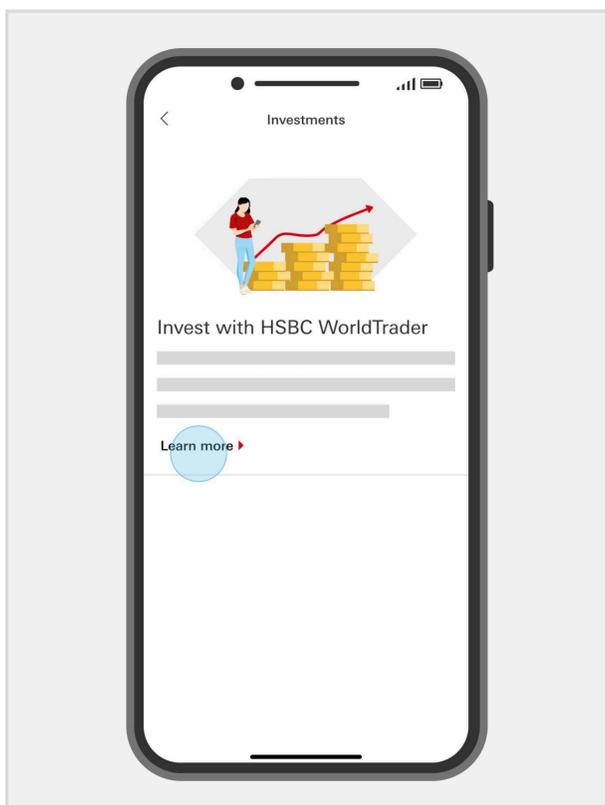
- ✓ Hold an eligible individual HSBC Australia bank account\*
- ✓ Be over 18 years of age
- ✓ Be an Australian tax resident
- ✓ Be registered for online banking, using the HSBC Australia app

\*Eligible individual accounts:

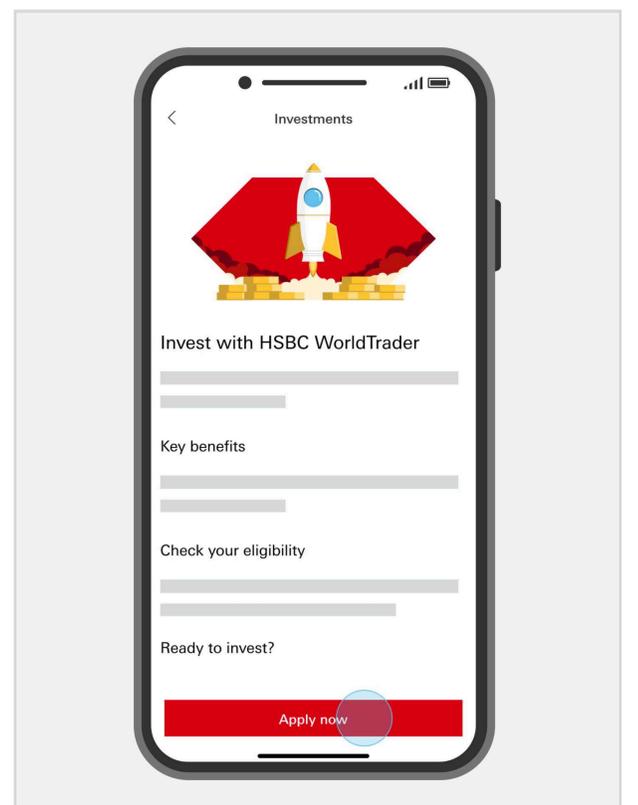
HSBC Everyday Global Account, Bonus Savings Account, Day to Day Account, Premier Cash Management Account.



Log on to your HSBC Australia app. From the Accounts tab, go to Discover more products → Investments.



Select 'Learn more'.



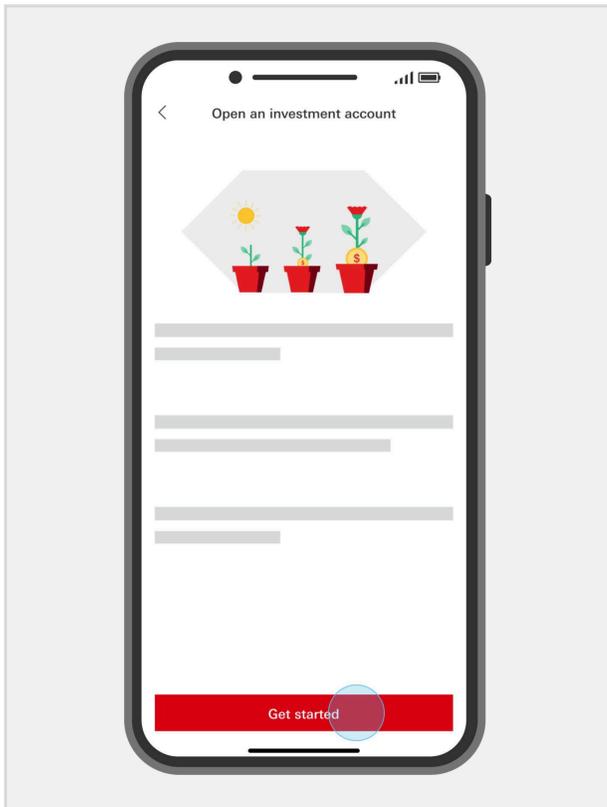
Read about the eligibility criteria and important information related to HSBC WorldTrader. Select 'Apply now'.

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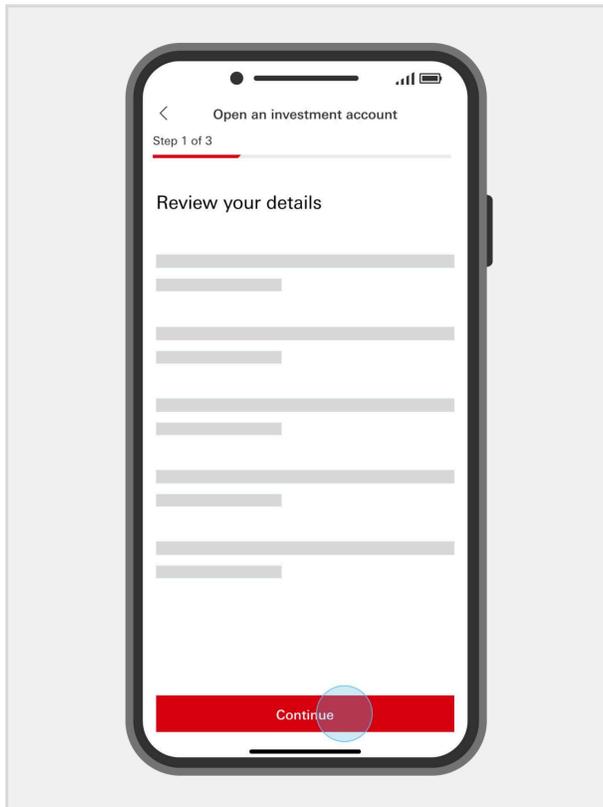
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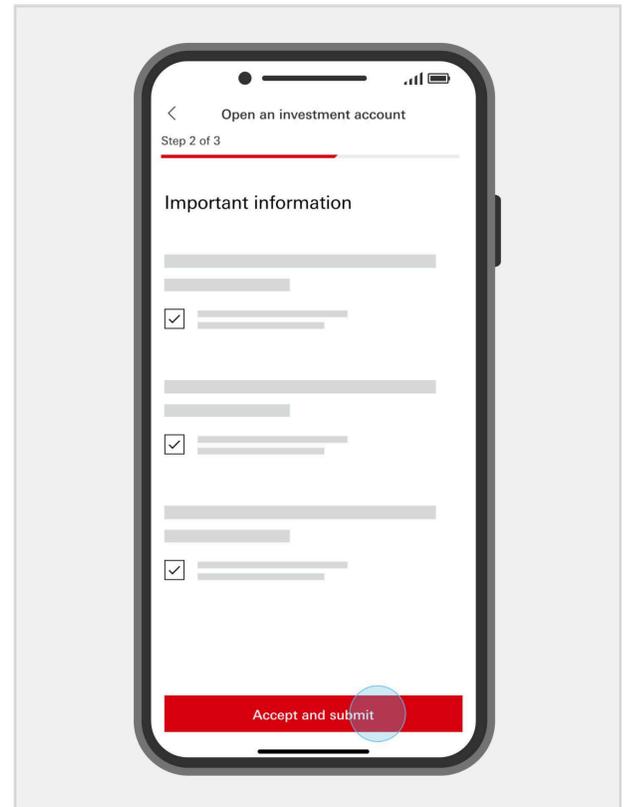




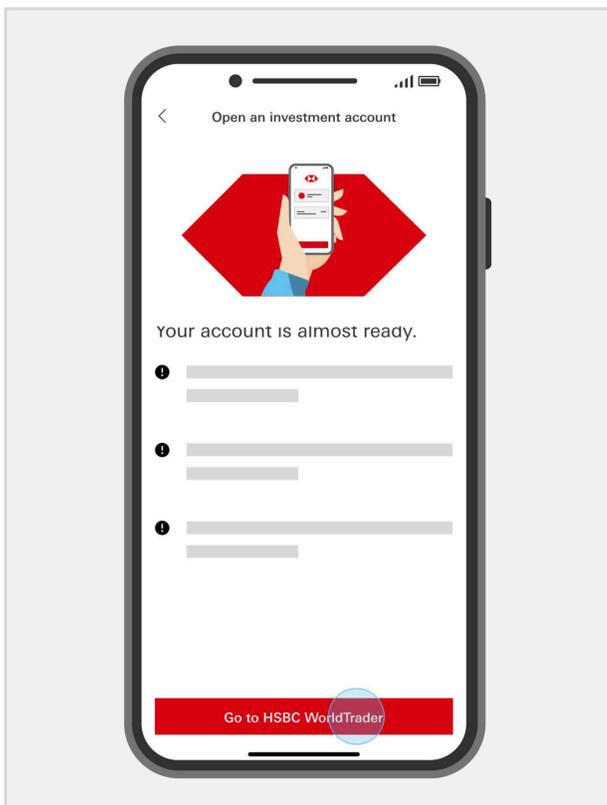
Once you've read the steps for opening an investment account, select 'Get started'.



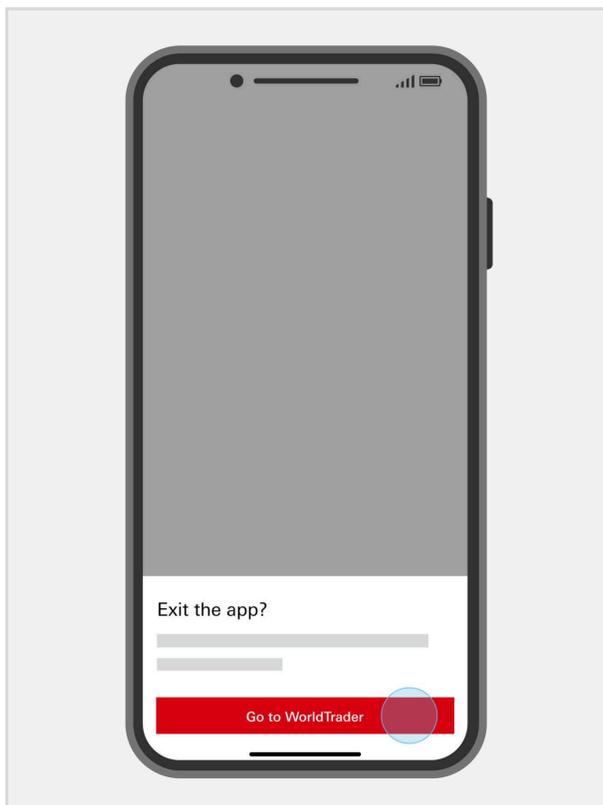
Review your details – if they are all up to date, select 'Continue'.



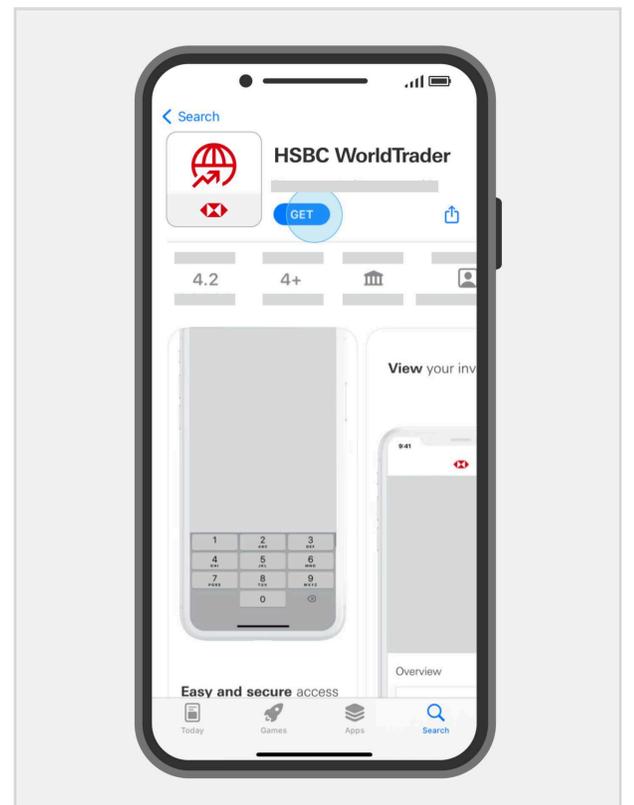
Once you've reviewed and understood the important documents, tick the declarations and select 'Accept and submit' to open your account.



The first part of your application is done. Complete your application by selecting 'Go to HSBC WorldTrader'.



You'll be prompted to exit the HSBC Australia app and select 'Go to WorldTrader'. You'll need to download the HSBC WorldTrader app, if you haven't already.



Download the HSBC WorldTrader app from the App Store or Google Play.

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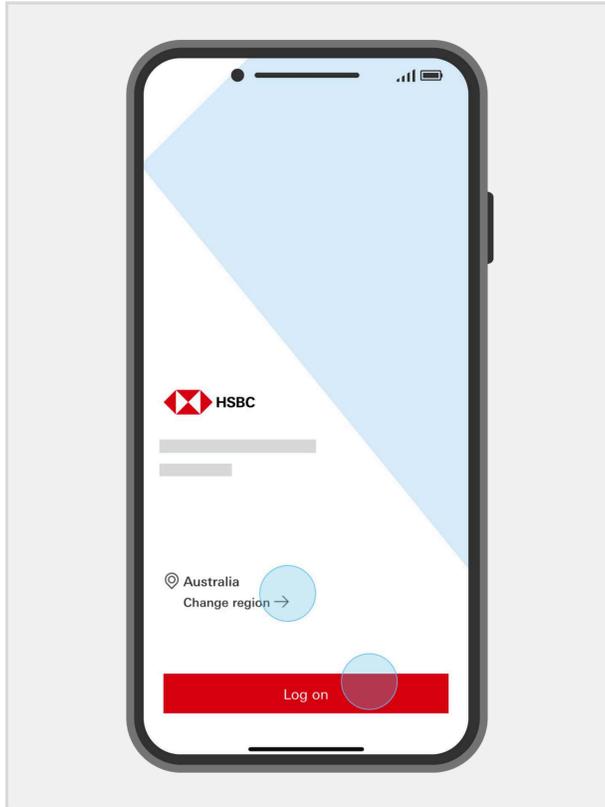
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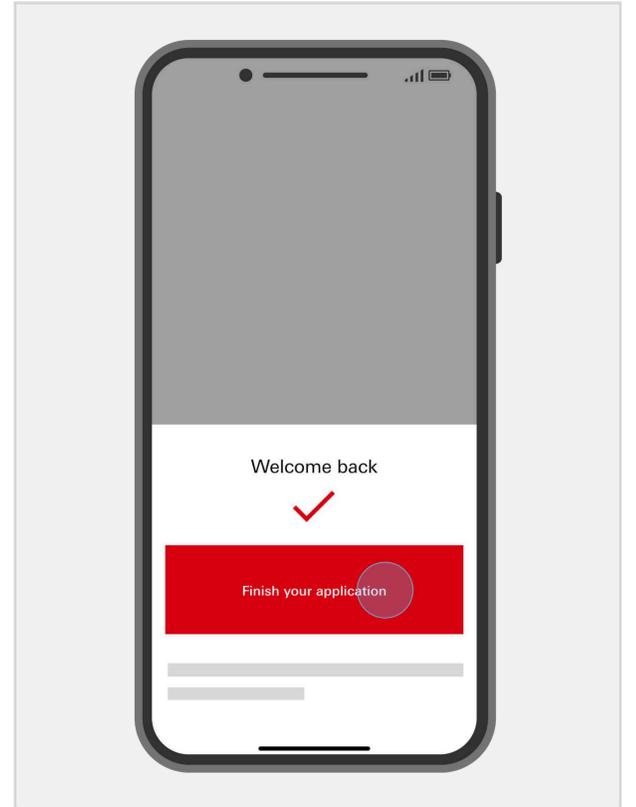




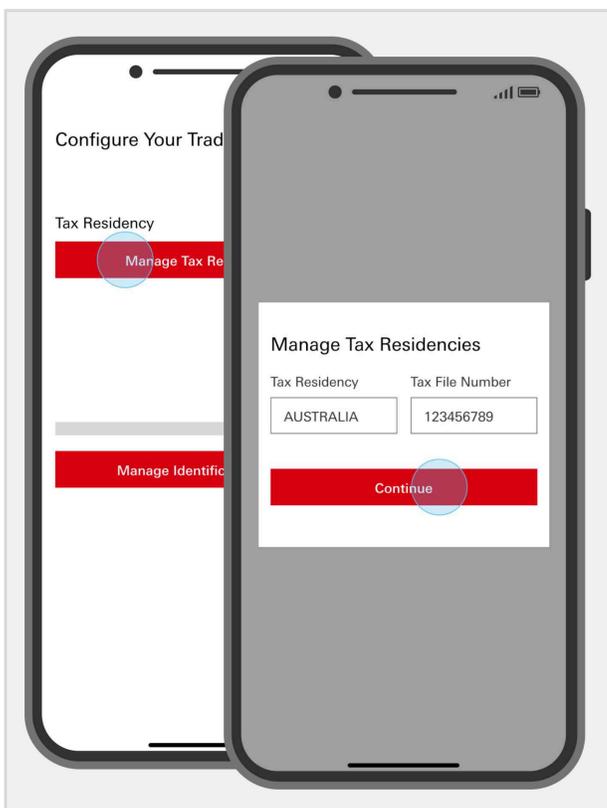
Open the HSBC WorldTrader app on your device.



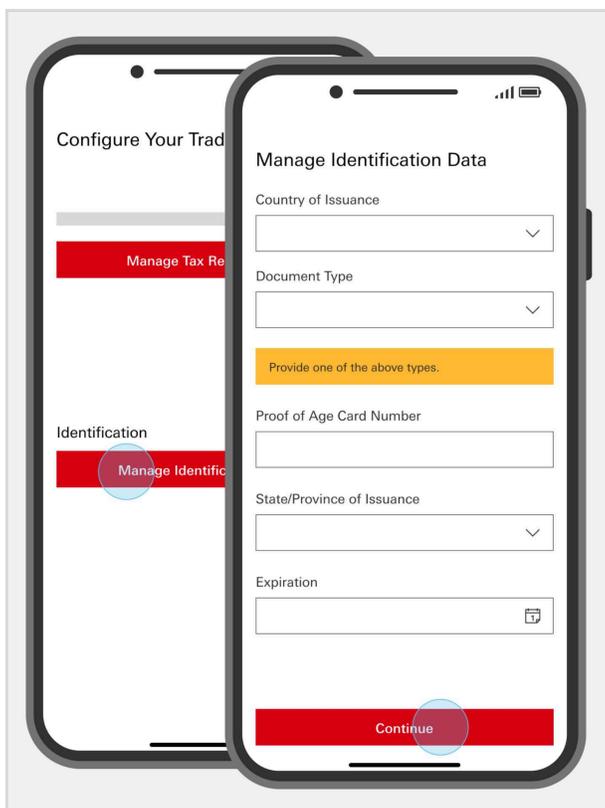
Make sure you've selected 'Australia' as your location and select 'Log on'.



Select 'Finish your application'.



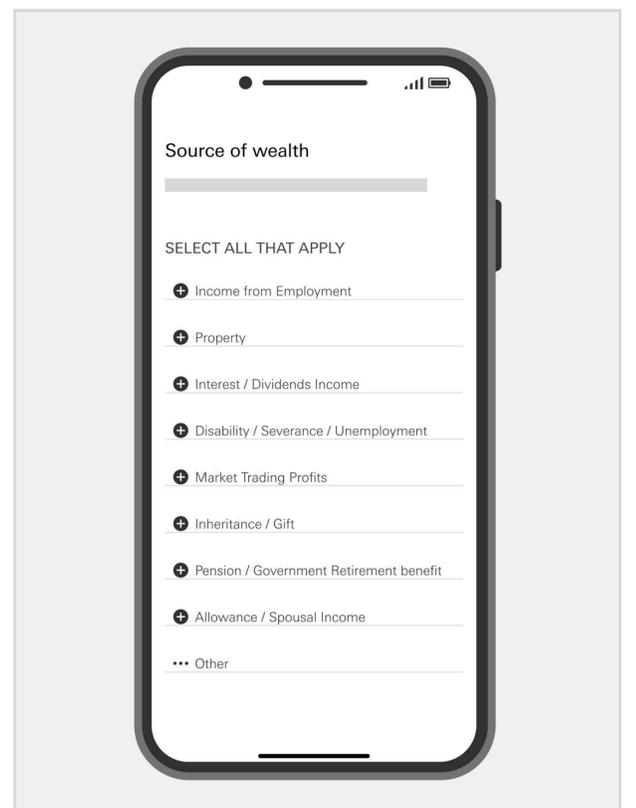
Select 'Manage Tax Residencies' to provide your tax details. Select 'Australia' and input your TFN.



Select 'Manage Identification Data'. Once you've entered and reviewed your tax and ID details, select 'Continue'.

**IMPORTANT**

You may need to verify yourself by uploading a selfie which will be compared to your photo ID. Eligible photo IDs include your passport, driver license or photocard.



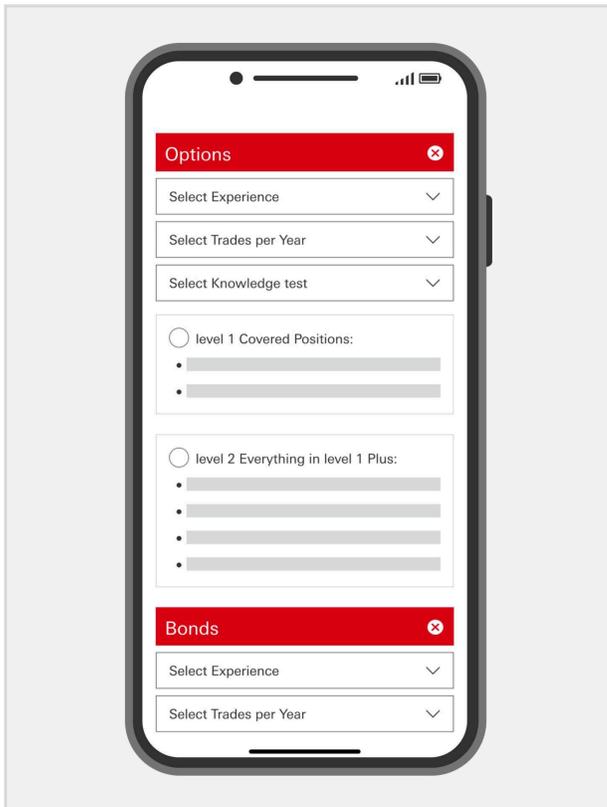
Select your sources of wealth from the list. Provide all necessary financial information about your income and wealth.

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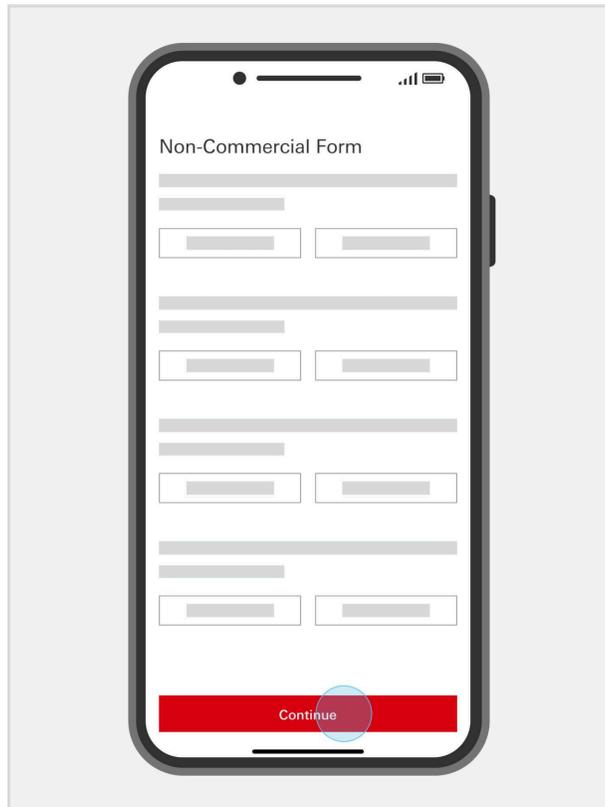




Select the investment products you want to opt-in for. To opt-out, select the 'X' next to the investment product type.

**IMPORTANT**

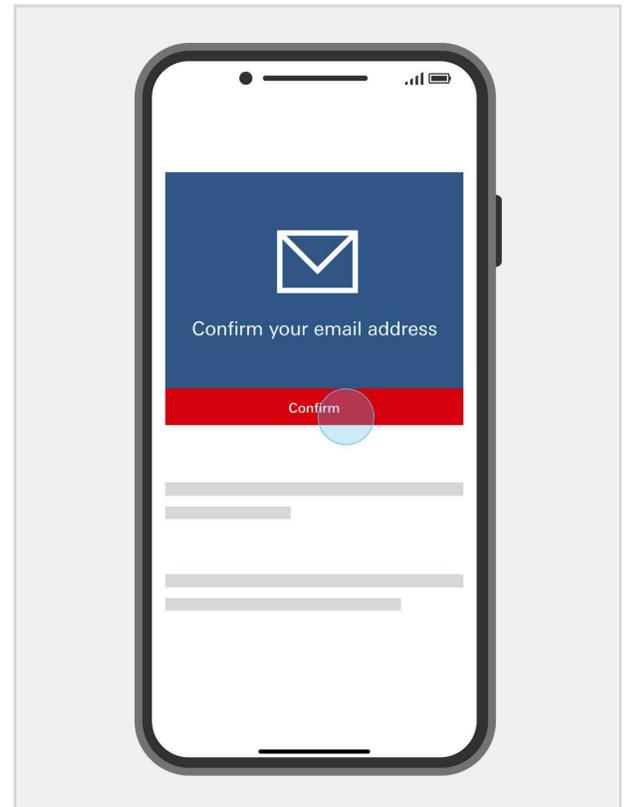
To opt-in for options and bonds, you'll need to complete an eligibility assessment. To skip this, opt-out of options and bonds.



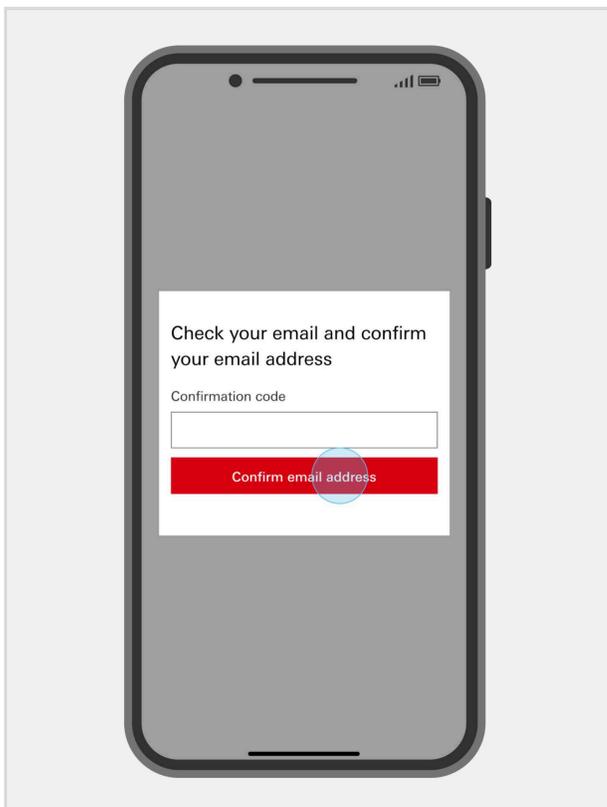
Carefully read and complete the 'Non-Commercial Form'. Once complete, select 'Continue'.

**IMPORTANT**

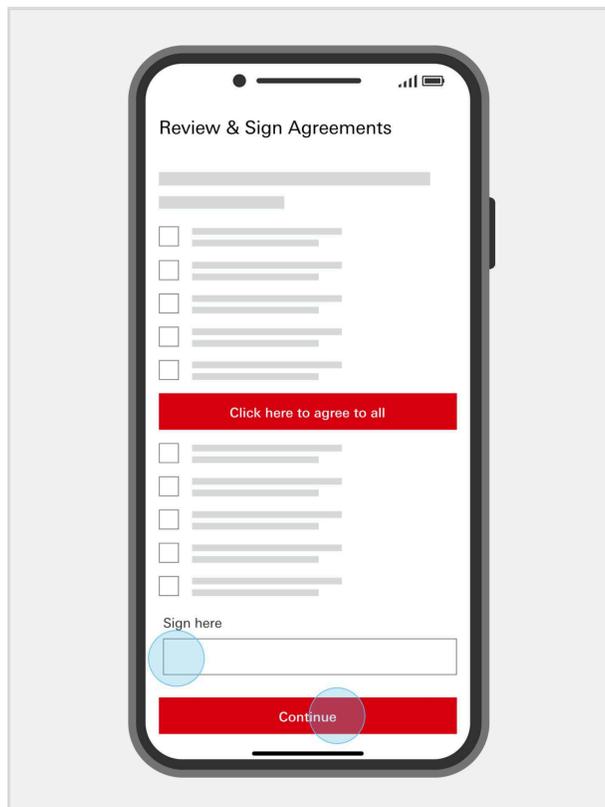
You'll need to individually select 'Yes' or 'No' for each question listed in order to continue.



Before we can open your investment account, you'll need to verify your email address. Select 'Confirm'.

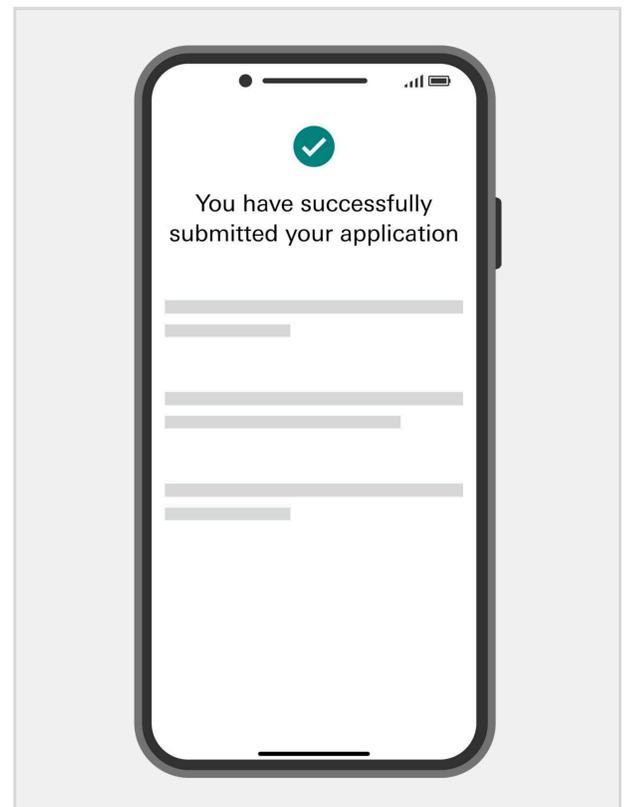


A confirmation code will be emailed to you. Enter this into the 'Confirmation Code' field and select 'Confirm Email Address'.



Review the agreements and disclosures. You must individually accept the T&Cs in the first section. You can then select the 'Click here to agree to all' button for the rest.

If you accept, type your name into the 'Sign here' field and select 'Continue'.



You've successfully submitted your application. You can check your application status in the HSBC WorldTrader app anytime.

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