

HSBC WorldTrader Guide



Your guide to using

HSBC WorldTrader

We're here to help

Contact our friendly customer service team at 1300 131 605.





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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.

• Accounts	
Everyday Global Account 123-456 78912345 Available Balance	80,000.00 AUD 80,000.00 AUD
Discover more products	
Transaction accounts	>
⑤ Savings and term deposits	>
合 Credit cards	>
	>
Personal loans	>
S Foreign currency accounts	>
🗠 Investments	>







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



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

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To open an HSBC WorldTrader account download the HSBC Australia Mobile Banking app.



HSBC WorldTrader is a broking service provided by Interactive Brokers Australia Pty Limited ABN 98 166 929 568 and AFSL 453554 ("IBA") at the request of HSBC Bank Australia Limited ABN 48 006 434 162 and AFSL 232595 ("HSBC "). You should read the HSBC Financial Services Guide (FSG) and IBA FSG, which provide you with information on the services provided by HSBC and IBA. You can access the HSBC FSG here and charges, click here. Issued by HSBC Bank Australia Limited ABN 48 006 434 162 AFSL 232595.









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.







Download the HSBC WorldTrader app

Complete your application by selecting 'Go to HSBC WorldTrader'.

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

from the App Store or Google Play.

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

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. wealth.

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O level 2 Everything in level 1	Plus:
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•	
•	
Bonds	8
Select Experience	\sim
Select Trades per Year	\sim

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-Commerical 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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