



# Your guide to using HSBC WorldTrader

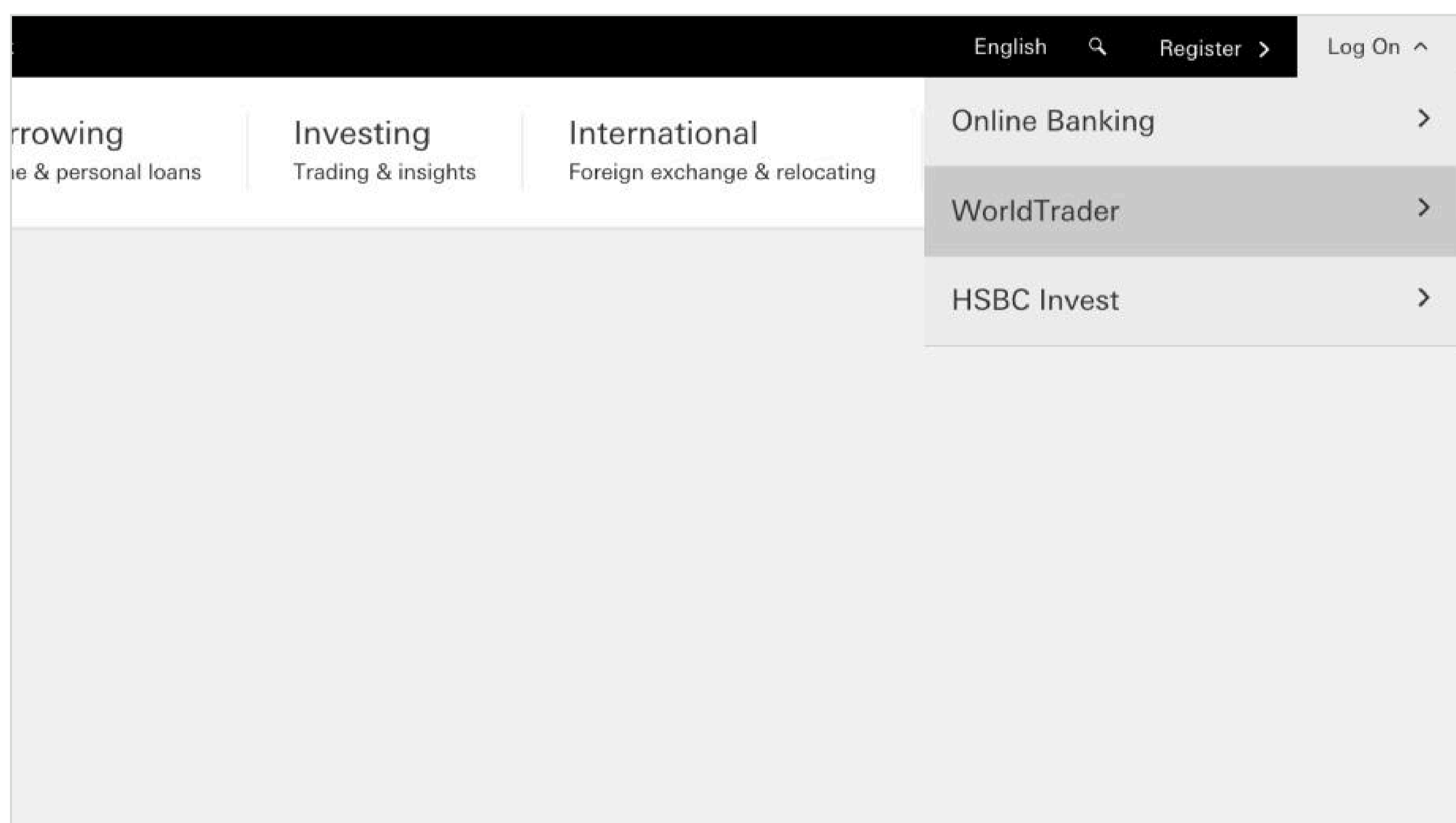
We're here to help

Contact our friendly customer service team at 1300 308 008.

# Annual account information update

## Before you start:

- ✓ Use a web browser to complete this task, there is no functionality to complete this on your HSBC WorldTrader mobile app.
- ✓ Set aside enough time to complete the task in one sitting, as progress cannot be saved. Exiting will result in loss of any entered information.
- ✓ Don't skip steps, or you may not be able to continue.



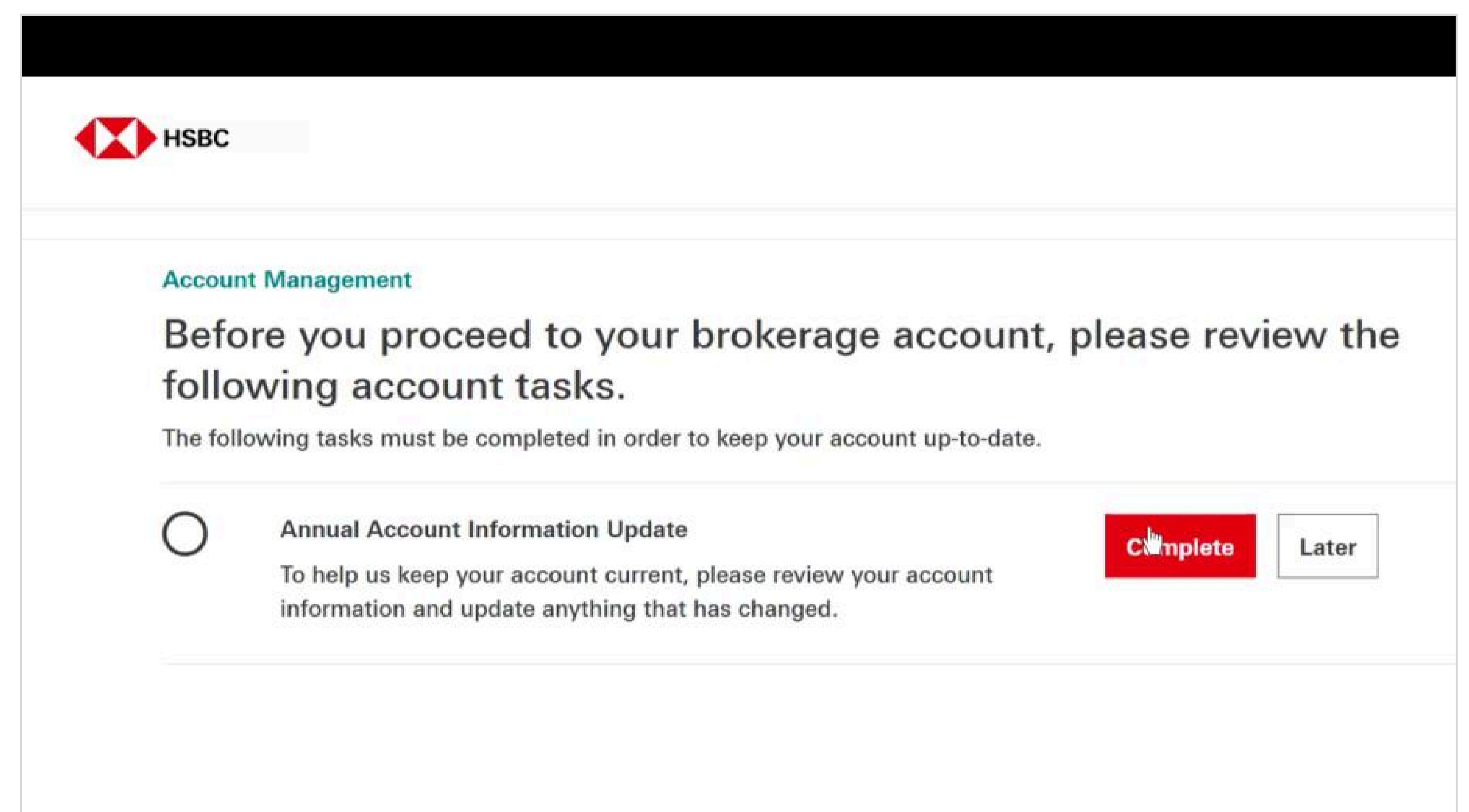
## Step 1: Log on and open WorldTrader

To log on to HSBC WorldTrader, you'll need to use a web browser. Go to the HSBC website and select Log On in the top right-hand corner.

From the drop-down menu, choose WorldTrader, then enter your Online Banking log on details.

**IMPORTANT**

Access the WorldTrader Online portal via browser (not available in the HSBC WorldTrader mobile app).

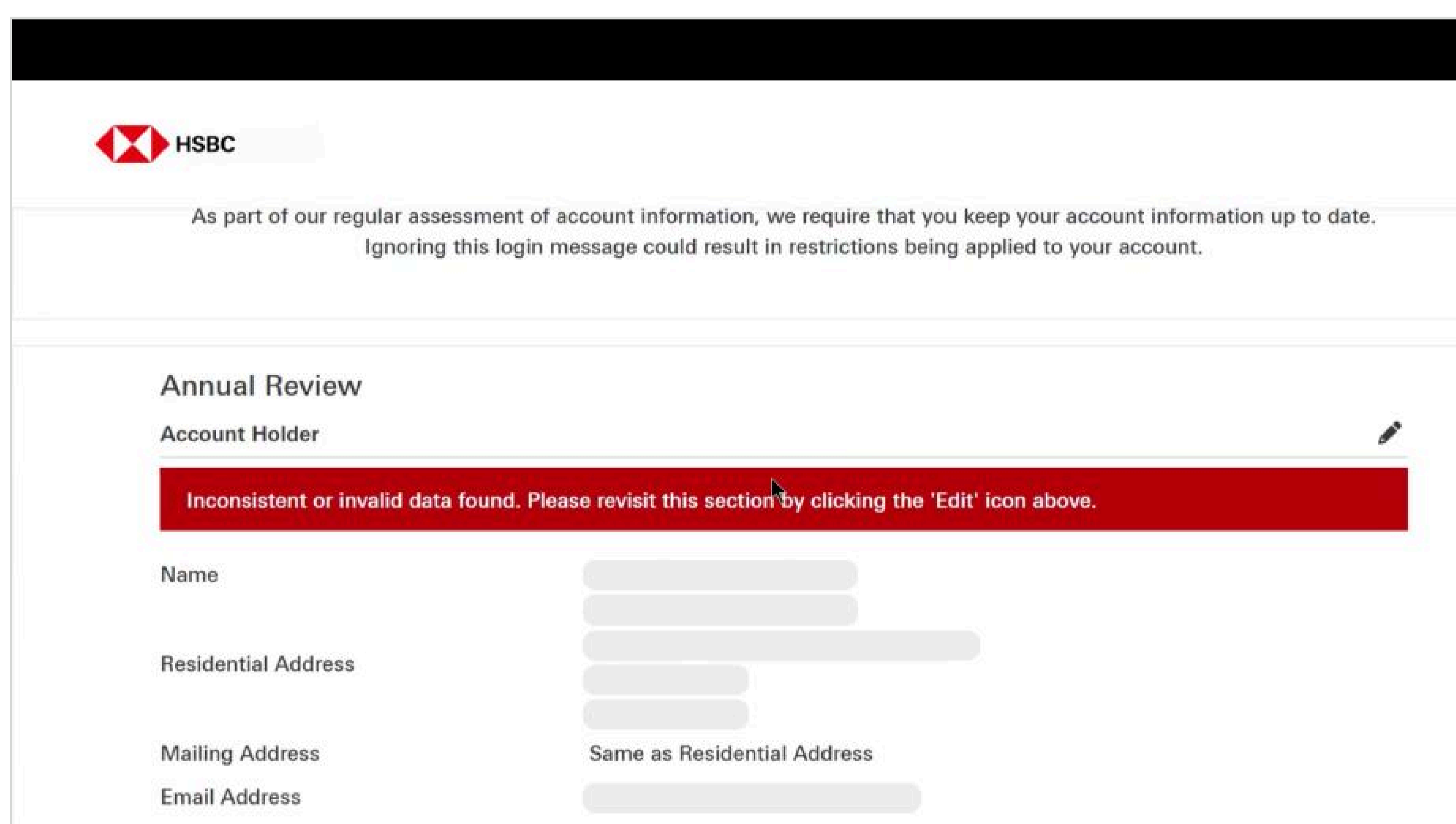


## Step 2: Start your Annual Account Information Update

Select 'Complete' to start your Annual Account Information Update.

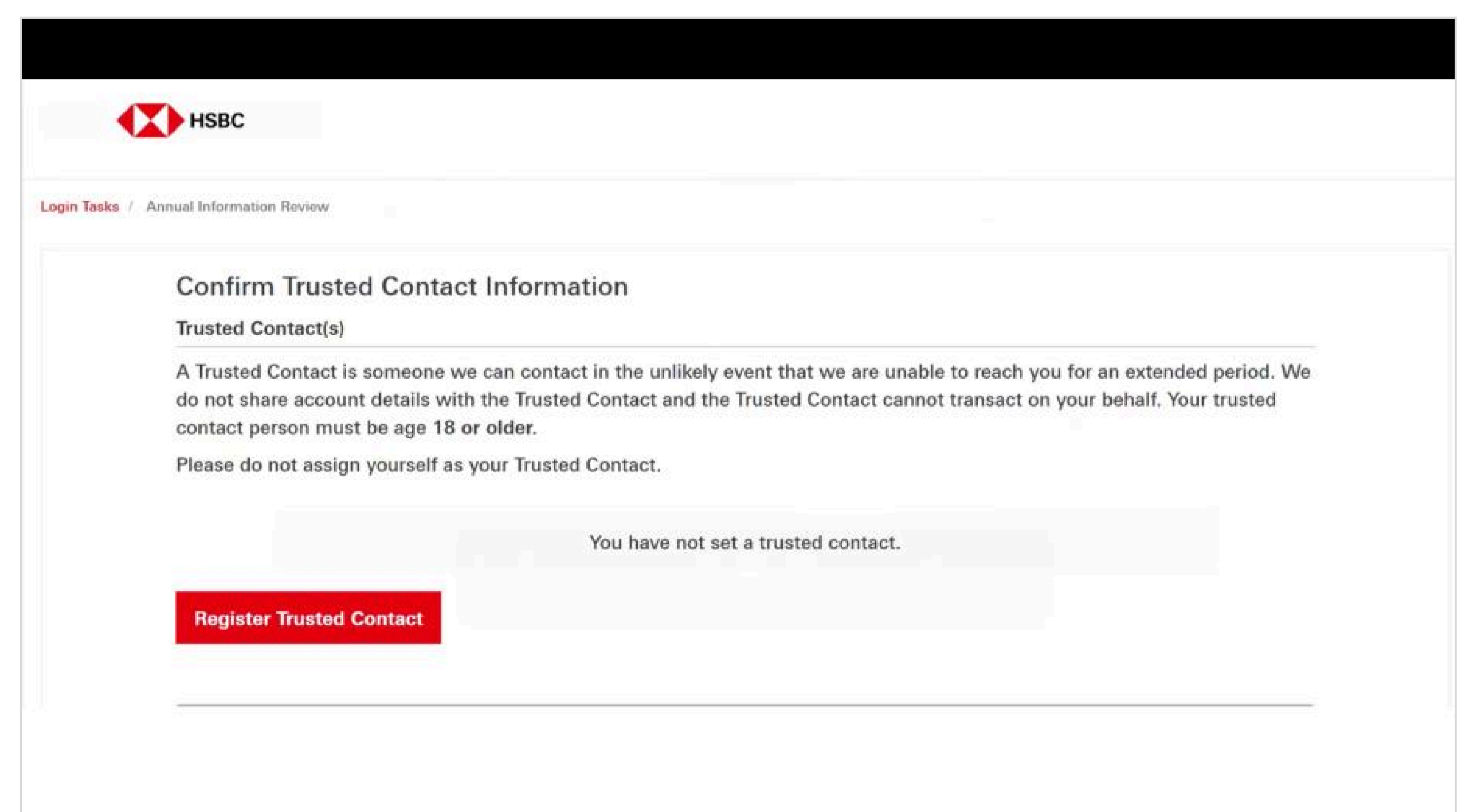
**IMPORTANT**

Complete all steps in one session, as progress cannot be saved. Exiting will result in a loss of any entered information.



## Step 3: Review and complete your details

Select the edit icon, review the pre-filled details, and complete all mandatory fields. When you're done, select 'Continue'.



## Step 4: Confirm Trusted Contact Information

If you have not already, you will need to register a trusted contact person.

**IMPORTANT**

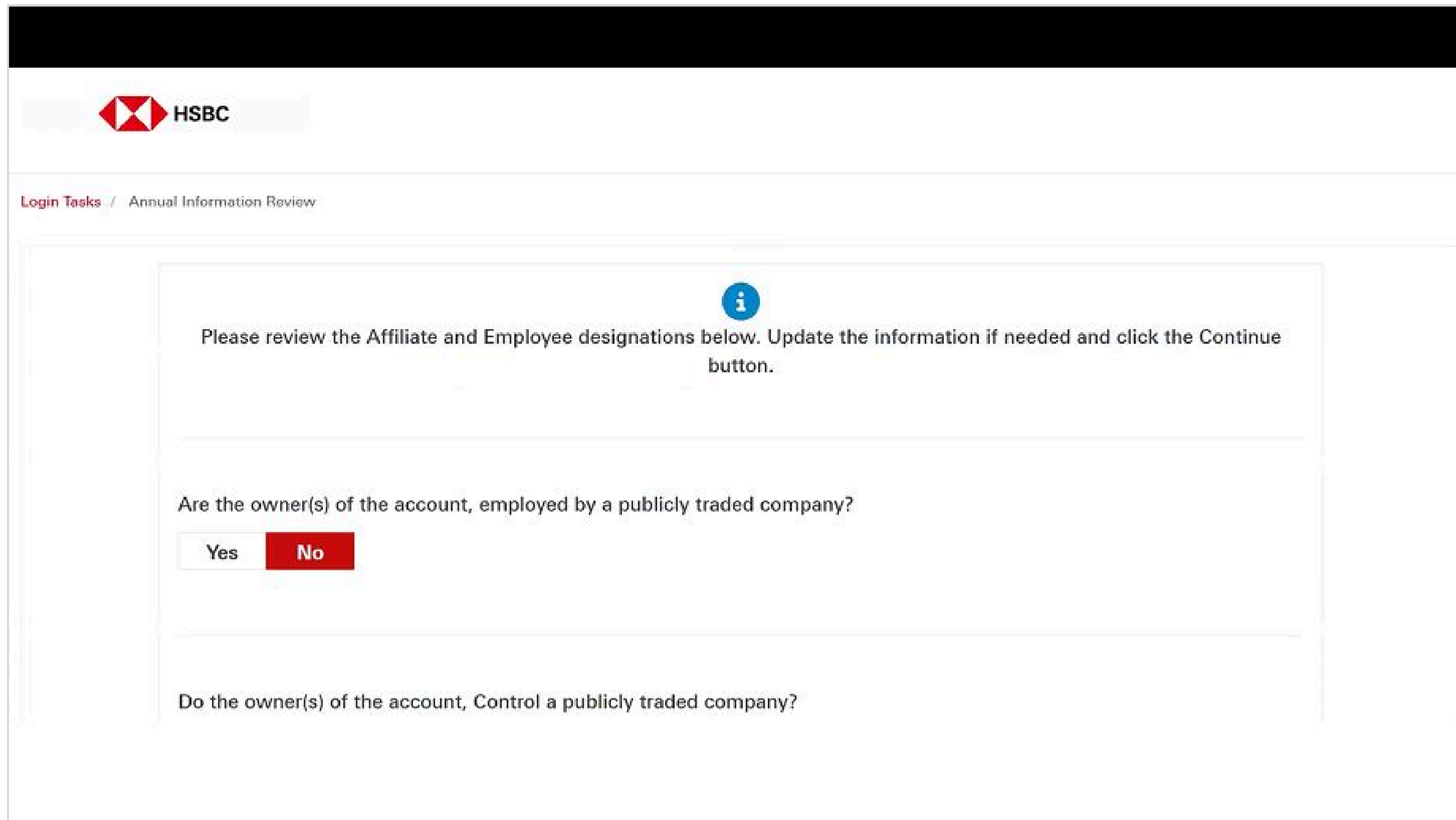
This step is required, if you skip it, you won't be able to continue.

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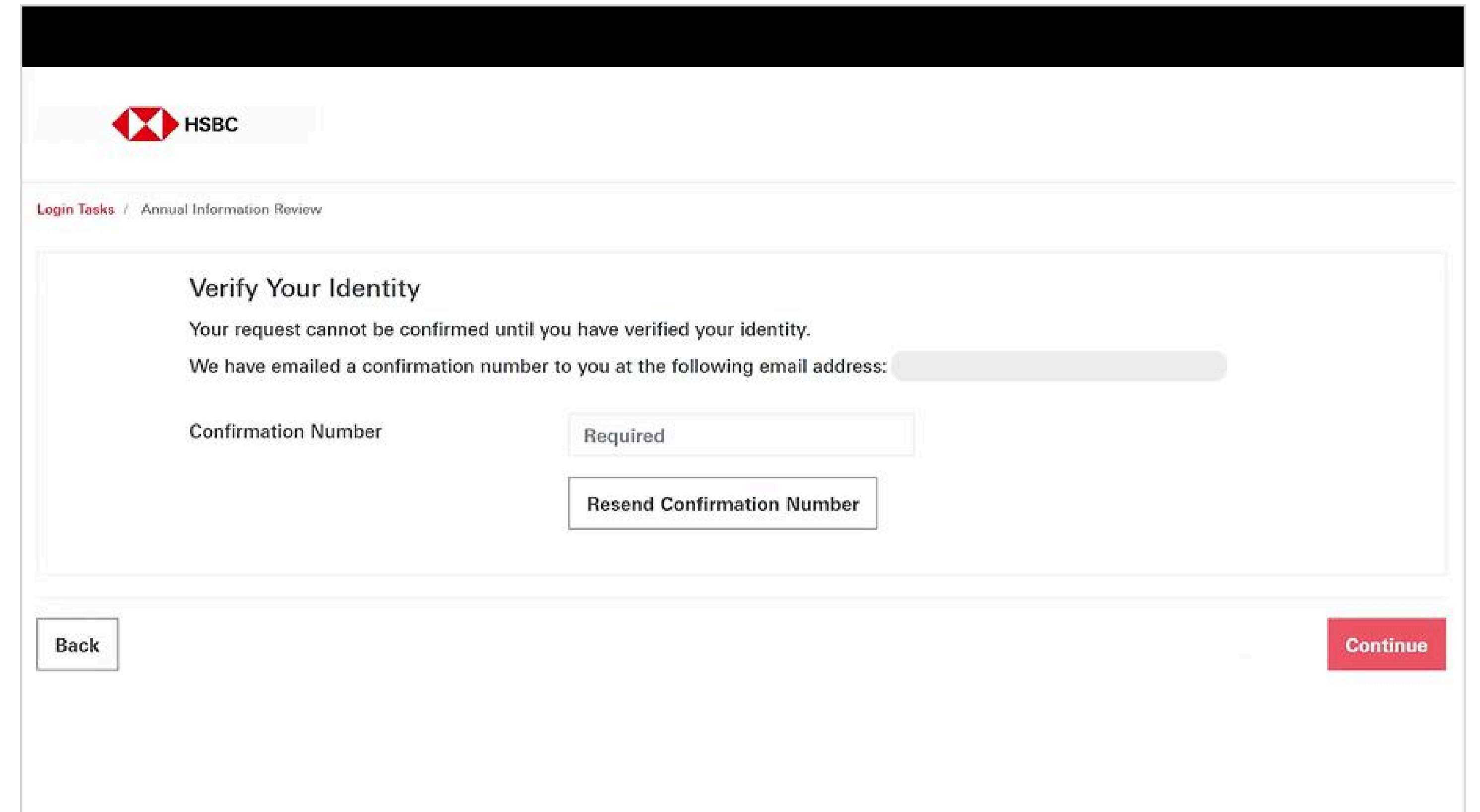
To open an HSBC WorldTrader account download the HSBC Australia Mobile Banking app.





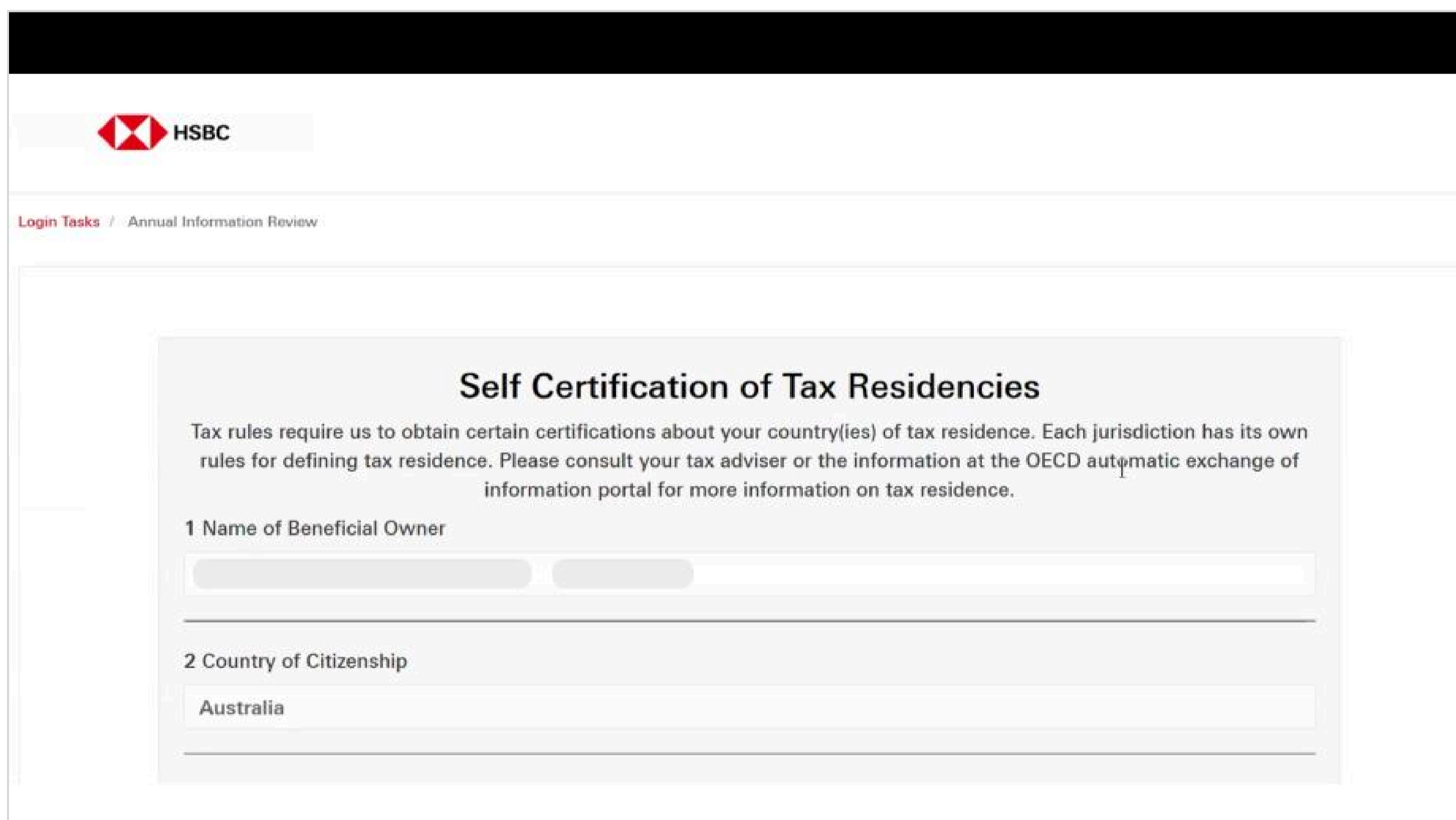
## Step 5: Confirm Affiliate and Employee designations

Review and confirm your Affiliate and Employee designations, then select 'Continue'.



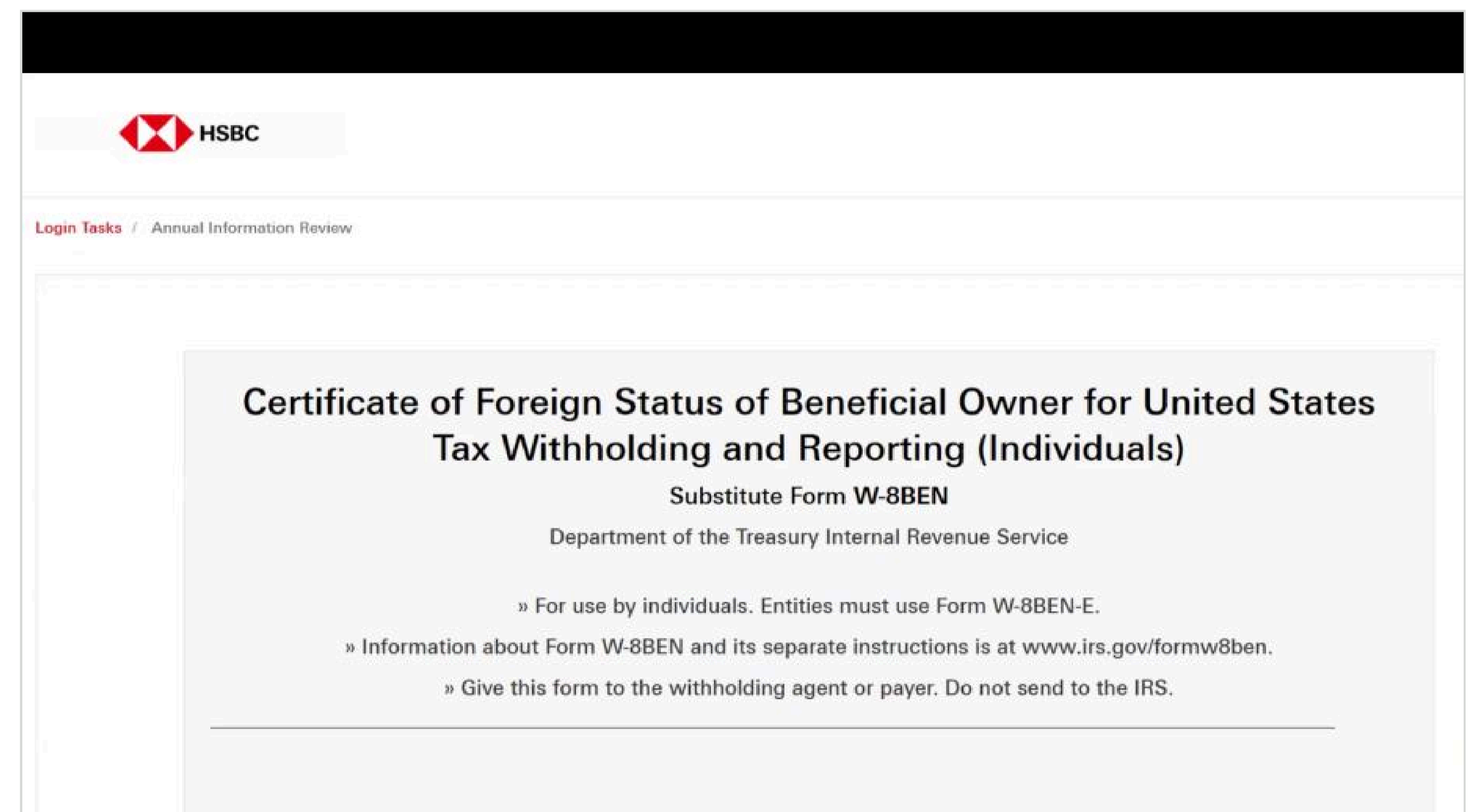
## Step 6: Verify your identity (email confirmation number)

When you open this screen, a confirmation number is sent **automatically** to your registered email address. Enter the number and select 'Continue'.



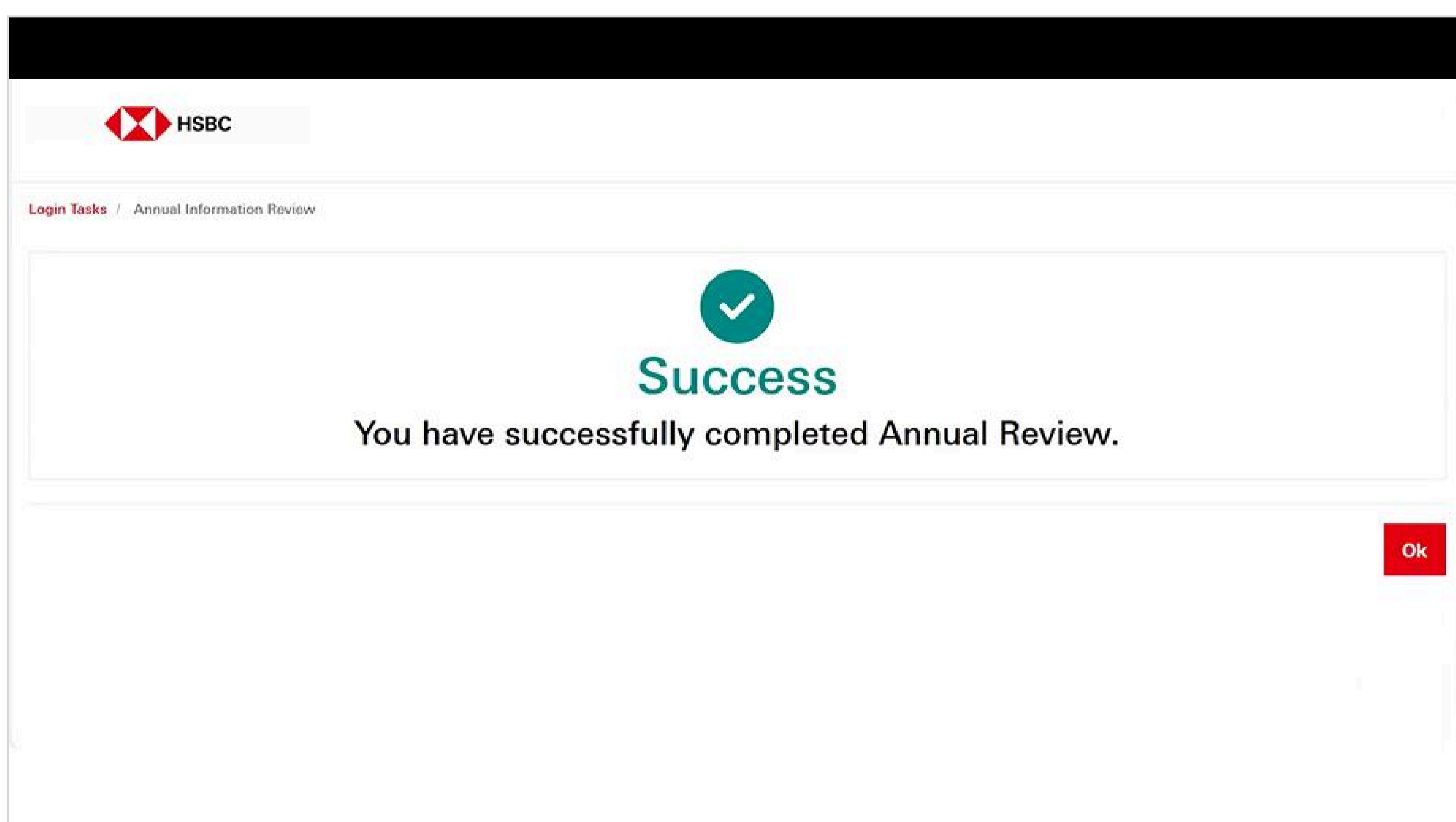
## Step 7: Complete Self Certification of Tax Residencies

Review the Self Certification of Tax Residencies screen. In the signature field, type your name exactly as shown, including capitalisation (for example, ALL CAPS if it's displayed in ALL CAPS), then select 'Continue'.



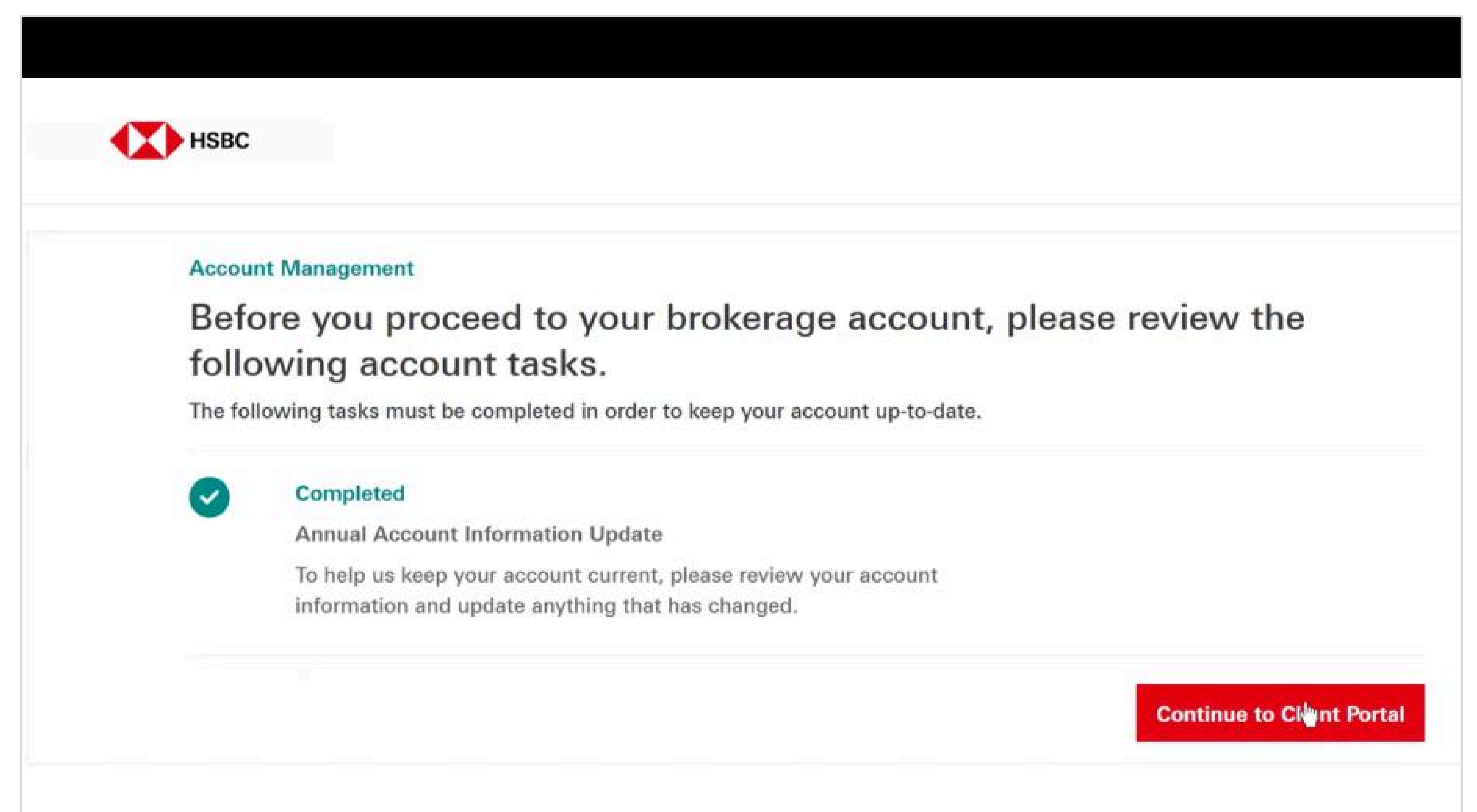
## Step 8: Sign the W-8BEN form

On the W-8BEN Form Signature page, type your name exactly as shown, including capitalisation and any special characters then select 'Continue'.



## Step 9: Submit your Annual Review

Review the submission confirmation message, then select 'Ok'. Select 'Continue to Client Portal' to return to the portal.



## Step 10: Check for any remaining tasks

On your portal dashboard, select Notifications (bell icon, top right) and confirm there are no pending tasks.

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