

Are you looking to gain exposure to better investment opportunities? Diversify your investments into new areas to grow your wealth? Then let a global leader in banking open up exclusive opportunities with The HSBC Accredited Investor Service.

With HSBC, experience a truly personalised Investment Service from our team of investment specialists. Delivering you support, transparency, and expert insights to help you unlock more investment opportunities. Benefit from access to an Executive Relationship Manager to look after your main banking requirements. They will get to know you, your investment style and support you on your investment journey.

With The HSBC Accredited Investor Service access a comprehensive investment platform – HSBC Invest – that lets you trade in Shares, mFunds, ETFs, Bonds, with more exclusive products being added all the time. It's where you can make the most of real broker research and exclusive trading tools.

You'll pay no platform, membership or administration fees – you only pay when you transact. Trade online for as little as \$19.95 when trading directly. Alternatively, an investment specialist can make a trade on your behalf with brokerage fees as low as 0.66%.

With all your investments on the CHESSE sponsored platform, execute trades on demand and keep track of the value of your investment portfolio online.

Let the HSBC Investment Desk help you explore different investment asset classes. For example, how Bonds have the potential to provide higher returns than traditional deposit accounts, as well as offering more security than stocks.

Working with us can make it easier to access opportunities in other markets. You can easily move money around the world in your preferred currency with access to a full range of banking solutions.

By qualifying for HSBC Premier status, you will have access to Global View and Global Transfer providing full transparency of your global HSBC accounts and instant fee free transfers between them. Ask your Relationship Manager who can help you with this.

There are two ways to apply to become an HSBC Accredited Investor:

You can qualify with the assets you have. Please have your accountant complete and sign the HSBC Wholesale Client/Sophisticated Investor Certificate to show you meet the net assets or income eligibility criteria. To do so, you should have at least an income of two hundred and fifty thousand Australian Dollars or two and a half million Australian Dollars in net assets, and you intend to invest more than one hundred and fifty thousand Australian Dollars with HSBC.

You will also need to have investment experience because this service is best suited to those with an understanding of financial markets.

If investing is your passion and you have a deeper understanding of markets and the products available, there is a second way to qualify, with HSBC now offering you a unique way to apply to become an Accredited Investor. If you don't meet the traditional asset test, you can demonstrate your knowledge, expertise, and ability to assess risks, so HSBC can approve you as a Sophisticated Investor.

To be eligible, you will need to have at least one million Australian Dollars in net assets and intend to invest more than one hundred and fifty thousand Australian Dollars with HSBC.

The HSBC Sophisticated Investor Knowledge Test is an industry first. It has been developed to comply with the Corporations Act 2001 (“Corporations Act”). The purpose of the Accreditation is to qualify wholesale clients on the grounds that the investor has sufficient experience to assess the features of the offer, value of the product or service, and risks associated with holding the product.

The test takes approximately 30 to 45 minutes to complete. If you don’t have enough time to complete it in one session, your progress will be saved for up to 30 days, allowing you to return when convenient.

The Knowledge Test comprises of three key categories: product features, product performance and product risk. The test ensures that you have a wide range of product knowledge, which covers five key asset classes: Equities, Fixed Income, Managed Funds, Exchange Traded Funds, and Structured Products.

Each asset class section has six multiple-choice questions. To pass, you will need to answer five out of the six questions in each section correctly and obtain a mark of at least 80% overall.

Customers who fail the Knowledge Test can reattempt the test again after two weeks.

To access the full benefits of this investment service, you will also need to register for HSBC Invest – your trading hub. It provides instant access to trade Shares, Bonds, ETFs, managed funds and more. It also shows cash flow visibility, so you have the information you need to execute your investment decisions quickly.

If you are a new customer, you will need to apply for HSBC Invest first. Once you’re registered for HSBC Invest, you can then log on to HSBC Internet Banking to apply to become an Accredited Investor with HSBC.

Become an HSBC Accredited Investor and take control of your investments with a global leader in banking.

Contact our Investment Desk for more information on 1300 308 019 or speak to your Relationship Manager.