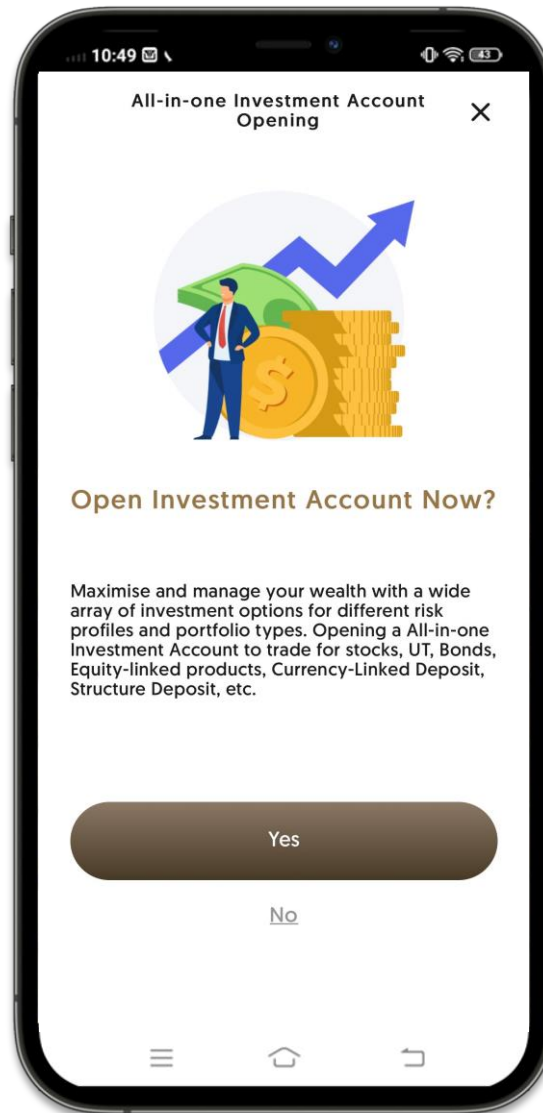


8 All-in-one Investment Account Opening

You can now open an All-in-one Investment Account via your mobile. In just **5** simple steps, Investment Account, Currency-linked Deposit Account and Structured Deposit Account will be opened in one go. You then can perform different types of investment whenever you want!



Before you start opening an All-in-one Investment Account, make sure you:

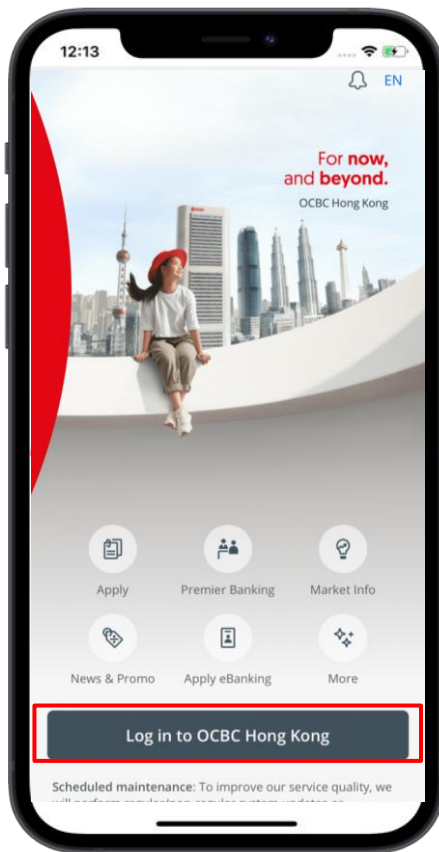
- ✓ Have a valid mobile number under the bank record
- ✓ Haven't Opened Investment Account, Currency-Linked Account and/or Structured Deposit Account before
- ✓ A non-U.S. citizen or other U.S. person

8 All-in-one Investment Account Opening

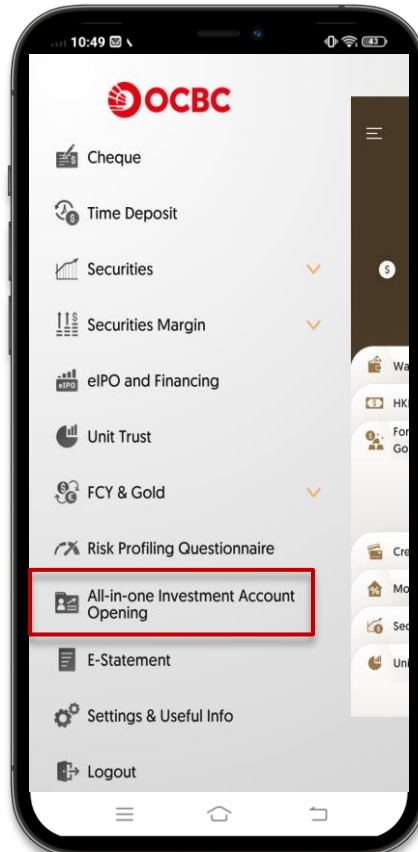


Start application

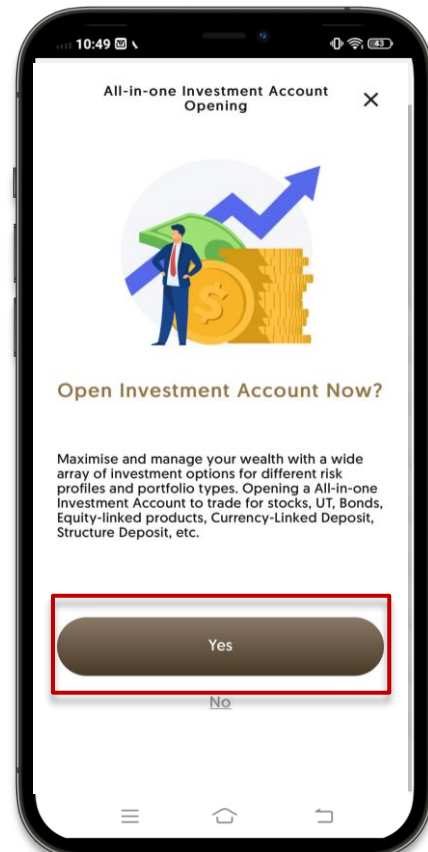
1 Login Mobile Banking



2 Click "All-in-one Investment Account Opening"



3 Tap "Yes" to start



Step 1

Step 2

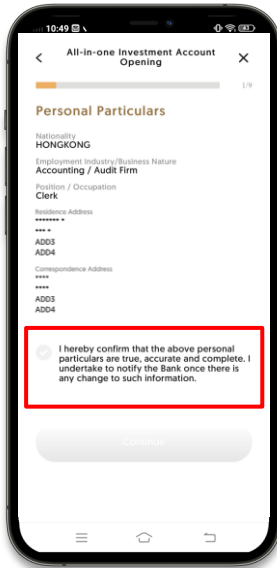
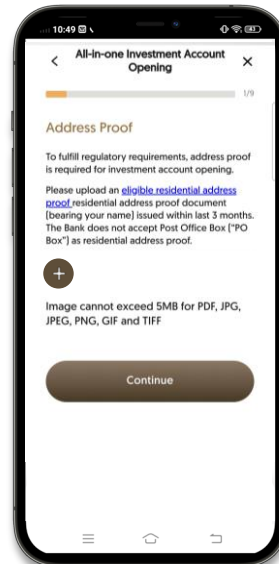
Step 3

Step 4

Step 5

Confirm information & choose settlement account

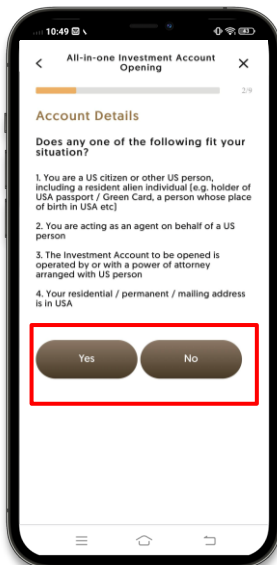
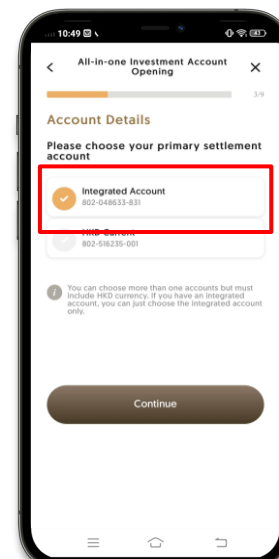
Review and confirm your personal particulars

Hint

You will be required to provide residential address proof for investment account opening if you do not have address proof record at our Bank.

Review and confirm your account details and choose a primary settlement account

Hint

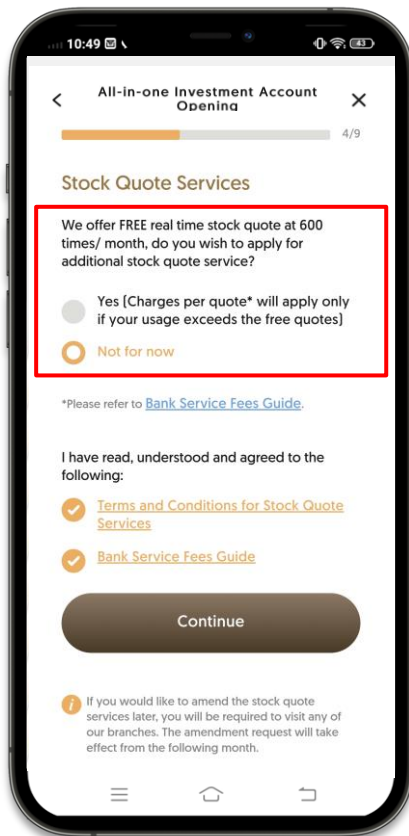
Choose Integrated Account as primary settlement account, the system will settle directly from the relevant foreign currency account when performing transactions in foreign currencies. You can save cost on exchange rates.

8 All-in-one Investment Account Opening



Choose service options

1 Choose Stock Quote Service options



Stock Quote Services

We offer FREE real time stock quote at 600 times/ month, do you wish to apply for additional stock quote service?

☐ Yes [Charges per quote* will apply only if your usage exceeds the free quotes]

☒ Not for now

*Please refer to [Bank Service Fees Guide](#).

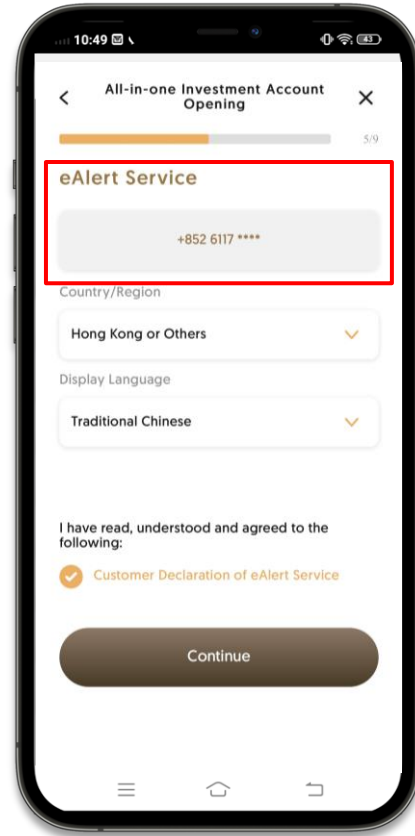
I have read, understood and agreed to the following:

- ☒ [Terms and Conditions for Stock Quote Services](#)
- ☒ [Bank Service Fees Guide](#)

Continue

i If you would like to amend the stock quote services later, you will be required to visit any of our branches. The amendment request will take effect from the following month.

2 Choose eAlert Service options



eAlert Service

+852 6117 ****

Country/Region

Hong Kong or Others

Display Language

Traditional Chinese

I have read, understood and agreed to the following:

- ☒ Customer Declaration of eAlert Service

Continue

Step 1

Step 2

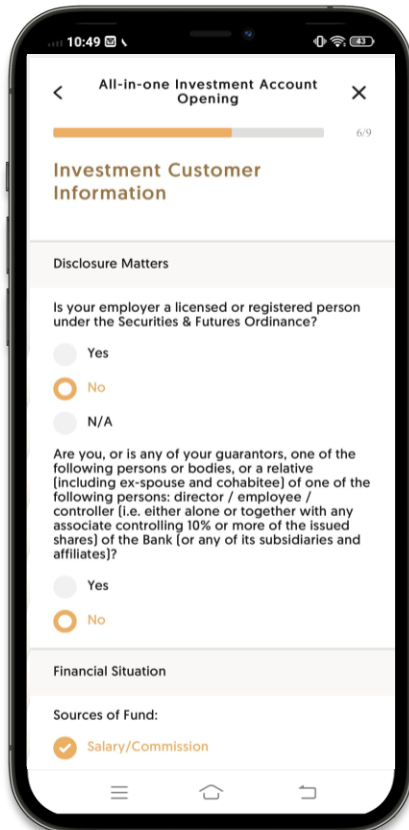
Step 3

Step 4

Step 5

Complete questionnaire

Complete a short questionnaire



10:49

All-in-one Investment Account Opening

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Investment Customer Information

Disclosure Matters

Is your employer a licensed or registered person under the Securities & Futures Ordinance?

☐ Yes

☒ No

☐ N/A

Are you, or is any of your guarantors, one of the following persons or bodies, or a relative (including ex-spouse and cohabitee) of one of the following persons: director / employee / controller (i.e. either alone or together with any associate controlling 10% or more of the issued shares) of the Bank (or any of its subsidiaries and affiliates)?

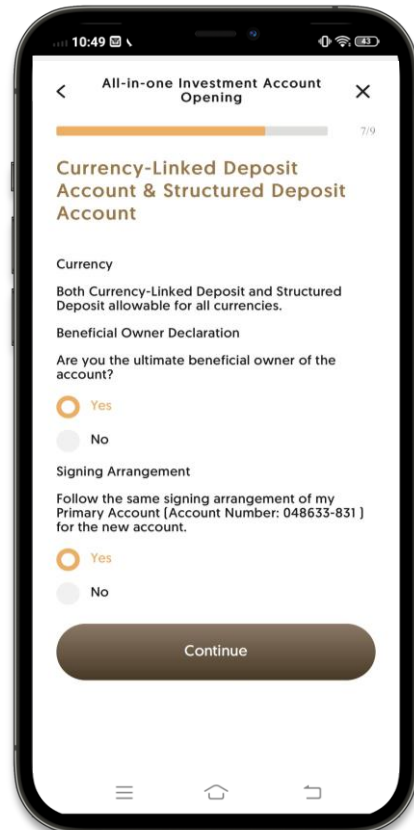
☐ Yes

☒ No

Financial Situation

Sources of Fund:

☒ Salary/Commission



10:49

All-in-one Investment Account Opening

7/9

Currency-Linked Deposit Account & Structured Deposit Account

Currency

Both Currency-Linked Deposit and Structured Deposit allowable for all currencies.

Beneficial Owner Declaration

Are you the ultimate beneficial owner of the account?

☒ Yes

☐ No

Signing Arrangement

Follow the same signing arrangement of my Primary Account [Account Number: 048633-831] for the new account.

☒ Yes

☐ No

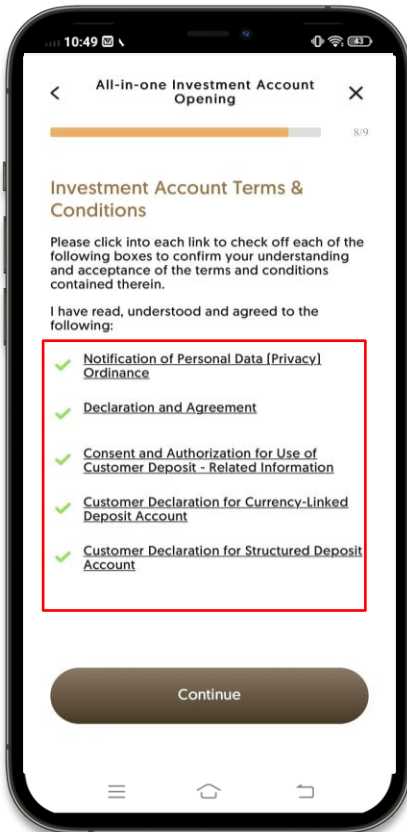
Continue

8 All-in-one Investment Account Opening



Confirm application

- 1 Read and agree Investment Account Terms & Conditions
- 2 Review and confirm your application
- 3 All-in-one investment account is opened



All-in-one Investment Account Opening

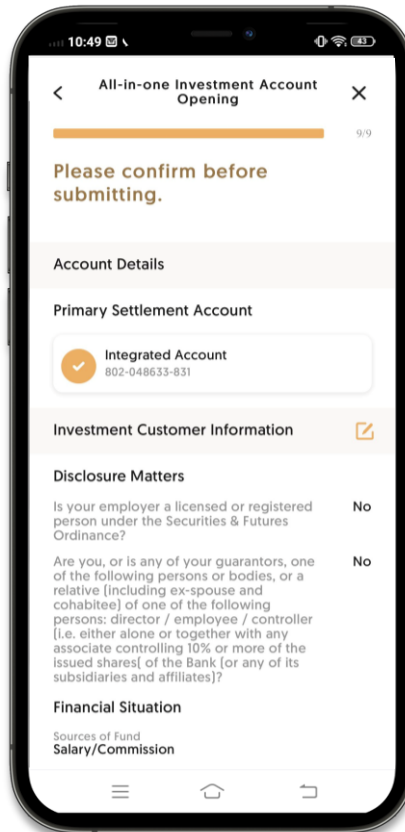
Investment Account Terms & Conditions

Please click into each link to check off each of the following boxes to confirm your understanding and acceptance of the terms and conditions contained therein.

I have read, understood and agreed to the following:

- ✓ [Notification of Personal Data \(Privacy\) Ordinance](#)
- ✓ [Declaration and Agreement](#)
- ✓ [Consent and Authorization for Use of Customer Deposit - Related Information](#)
- ✓ [Customer Declaration for Currency-Linked Deposit Account](#)
- ✓ [Customer Declaration for Structured Deposit Account](#)

Continue



All-in-one Investment Account Opening

Please confirm before submitting.

Account Details

Primary Settlement Account

Integrated Account
802-048633-831

Investment Customer Information

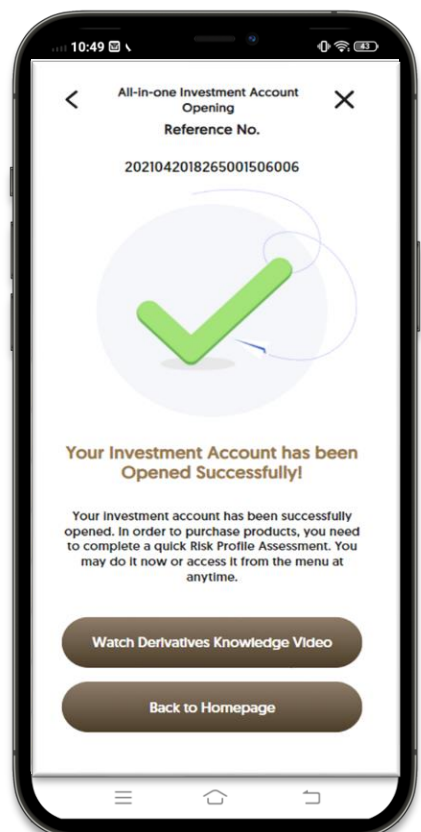
Disclosure Matters

Is your employer a licensed or registered person under the Securities & Futures Ordinance? No

Are you, or is any of your guarantors, one of the following persons or bodies, or a relative (including ex-spouse and cohabitee) of one of the following persons: director / employee / controller (i.e. either alone or together with any associate controlling 10% or more of the issued shares of the Bank (or any of its subsidiaries and affiliates)? No

Financial Situation

Sources of Fund
Salary/Commission



All-in-one Investment Account Opening

Reference No.

2021042018265001506006

Your Investment Account has been Opened Successfully!

Your investment account has been successfully opened. In order to purchase products, you need to complete a quick Risk Profile Assessment. You may do it now or access it from the menu at anytime.

Watch Derivatives Knowledge Video

Back to Homepage

Experience speedy All-in-One Investment Account Opening now