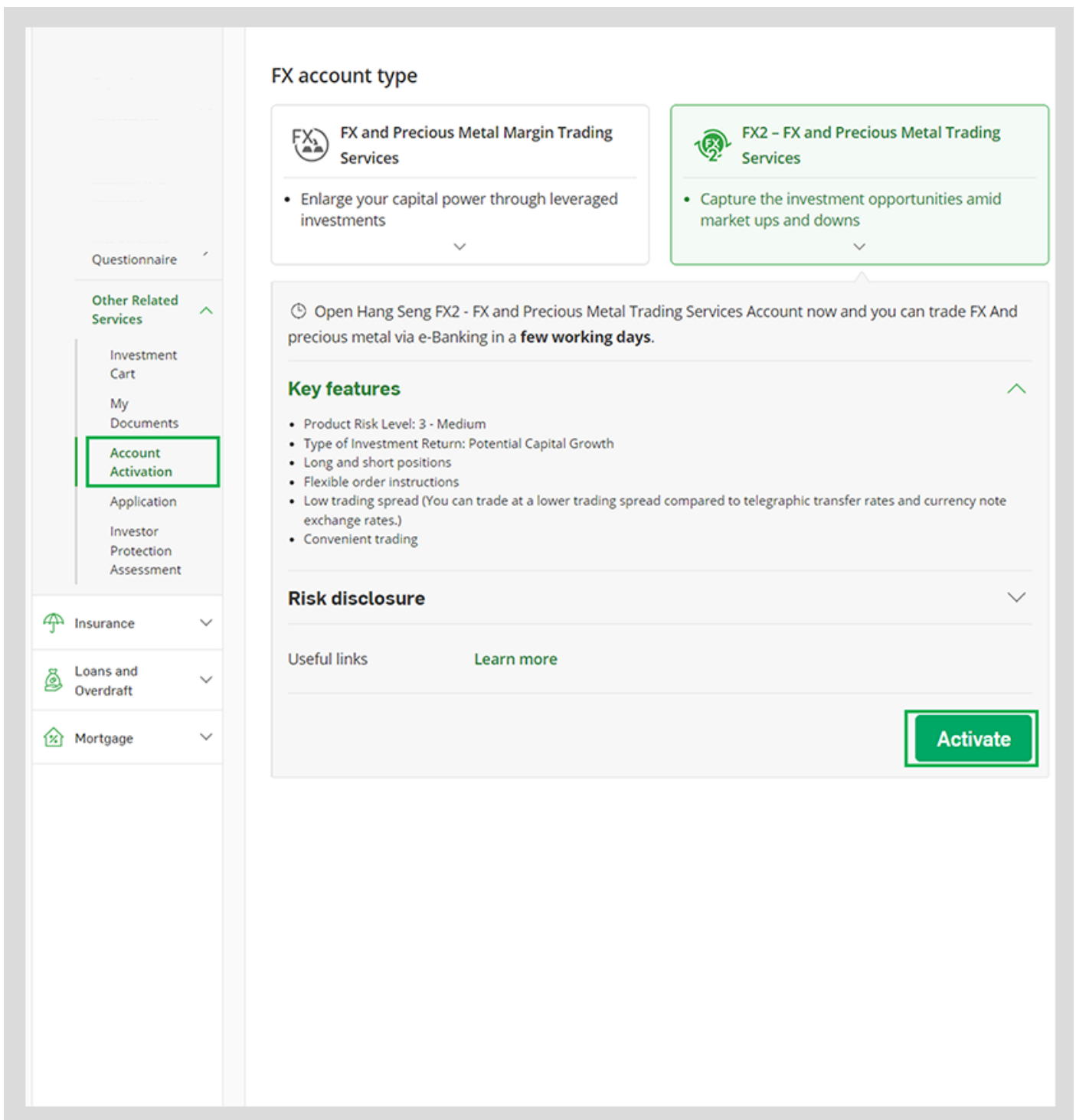


Step by step account opening guide

Step 1

Kick-start your FX2 Trading Service journey by selecting “Investments” > “Other Related Services” > “Account Activation” from the left menu, then click “Activate”.



The screenshot displays the 'Account Activation' page for FX2 Trading Services. The left sidebar menu includes 'Questionnaire', 'Other Related Services' (expanded), 'Investment Cart', 'My Documents', 'Account Activation' (highlighted with a green box), 'Application', 'Investor Protection Assessment', 'Insurance', 'Loans and Overdraft', and 'Mortgage'. The main content area is titled 'FX account type' and features two service options:

- FX and Precious Metal Margin Trading Services**: Enlarge your capital power through leveraged investments.
- FX2 - FX and Precious Metal Trading Services**: Capture the investment opportunities amid market ups and downs.

The 'FX2 - FX and Precious Metal Trading Services' option is highlighted with a green border. Below the options, a message states: "Open Hang Seng FX2 - FX and Precious Metal Trading Services Account now and you can trade FX And precious metal via e-Banking in a **few working days**."

Key features

- Product Risk Level: 3 - Medium
- Type of Investment Return: Potential Capital Growth
- Long and short positions
- Flexible order instructions
- Low trading spread (You can trade at a lower trading spread compared to telegraphic transfer rates and currency note exchange rates.)
- Convenient trading

Risk disclosure

Useful links [Learn more](#)

Activate

Declare whether or not you are a "Restricted Person" / "Connected Person".

If you are NOT a "Restricted Person" / "Connected Person", please select "Correct" as per the statement.

FX2 - FX and Precious Metal Trading Services account opening



Customers must use Mobile Security Key or Security Device to trade securities and other investment products online. Please view [Security for Trading Securities and Other Investment Products Online](#) for details.

Declaration

Step 1 / 6

I/We confirm that I am/we are NOT
"Restricted Person" ⓘ

Correct

Incorrect

I/We represent and warrant that I am/we
are NOT a connected person. ⓘ

Correct

Incorrect

- I undertake to immediately notify Hang Seng Bank Limited in writing if this information is no longer true and correct.
- I shall obtain consent and authorisation from such persons who are connected with HSBC Group^[1] as referred to above for the provision of their information to Hang Seng Bank Limited, its branches, subsidiaries^[1] and Affiliates^[1] for the purpose of enabling Hang Seng Bank Limited and its Affiliates^[1] to comply with the Banking (Exposure Limits) Rules.
- I hereby authorize Hang Seng Bank Limited to exchange with Hang Seng Bank Limited's branches, subsidiaries^[1] and Affiliates^[1] information relating to me and the facilities granted to me for the purpose of enabling Hang Seng Bank Limited and its Affiliates^[1] to comply with the Banking (Exposure Limits) Rules.

Back

Next

Step 3

Check and compare your risk tolerance level to the product risk level.
Select your type of investment return for transaction.

FX2 trading service serves the purpose of "potential capital growth" investment.

The product risk level of FX2 is level 3. If your risk tolerance level is lower than the product risk level, you are not eligible to activate an FX2 account.

Review Risk Profile Step 2 / 6

Risk level ⓘ

Your risk tolerance level is equal to or higher than the product risk level ^

Product risk level	Your risk tolerance level
<input checked="" type="radio"/> 3 Medium Risk	<input checked="" type="radio"/> 4 Medium to High Risk

Type of investment return ⓘ

Please select your type of investment return for transaction ^

Product investment return	Your type of investment return
A foreign exchange and precious metal trading service with potential capital growth.	<input type="radio"/> Capital preservation
	<input type="radio"/> Potential cash income
	<input type="radio"/> Potential capital growth

If there is any change to your personal circumstances or if you are in doubts whether this service is suitable for you hereafter, you are encouraged to consider seeking independent professional advice or not to proceed with the service.

Step 4

Check your personal particulars and set your Integrated Account as the Designated Account for FX2 Services. Money in your Collateral Accounts can only be transferred to such Designated Account. Then click "Next".

Read and tick the box if you accept e-statement/e-advice service.

Personal particulars Step 3 / 6

Please select your Integrated Account to be your designated FX and Precious Metal Trading Services account. Money in your collateral accounts can only be transferred to the following account.

Set up account under (all currencies) ⓘ	Integrated Account 123-456789-999
Residential address ⓘ	Room 10 , ***** *****
Correspondence address	Same as residential address Room 10 , ***** *****
Mobile phone number ⓘ	852*****15
E-Mail Address	abc***** @gmail.com
Opt-in for e-Statement / e-Advice service:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Important note(s)

You can set up to receive e-Statement/e-Advice and other communication related to your FX2 - FX And Precious Metal Trading Services Account. Your email address will be used for receiving the email reminder on the day of e-statement/e-Advice and other communication related to your FX2 - FX And Precious Metal Trading Services Account and other new investment account(s)/ sub-account(s) I open in the future will be set to receive e-Statement/e-Advice by default via my registered correspondence email address with the Bank and will be registered for Hang Seng "e-Statement / e-Advice Service" automatically unless I notify the Bank otherwise. Please ensure your registered correspondence email address in the Bank's record is valid to receive such communications. To change your e-statement setting, please login with your security device and change your setting under "Settings" > "My profile settings" > "Account List and maintain e-Statement/e- Advice", or you may call our Customer Service Hotline or visit our branches for assistance to change the preference for receiving e-Statement/e-Advice.

I acknowledge that I have read and understood the important notes for Hang Seng e-Statement / e-Advice Service above. [View more](#)

Statement date of each month

Employment Status

The above is your personal particulars recorded in the Bank for FX And Precious Metal Trading Services account opening. To change your e-mail address or/and residential address, please login with your security device and change your Personal Contact Information under "[Personal Particulars](#)".

Step 5

Input your account information (e.g. total assets, collateral account) and past investment experience, then click "Next".

If you do not have any investment experience in FX/Precious Metal Trading, Futures, Warrants and/or Options, you can watch an educational video and read the factsheet. Then confirm you have read the relevant investment declaration and agreed to proceed with this application.

You can select more than one collateral account in your desired currencies. You will need to visit our branch if you wish to open additional collateral accounts subsequently.

Account information Step 4 / 6

Total assets of applicant

Do you have investment experience in FX/precious metal trading, Futures,Warrants and/or Options?

Collateral account (compulsory) ⓘ

Additional collateral account (optional)

<input type="checkbox"/> EUR	<input type="checkbox"/> AUD
<input type="checkbox"/> CAD	<input type="checkbox"/> CHF
<input type="checkbox"/> GBP	<input type="checkbox"/> JPY
<input type="checkbox"/> NZD	

Verify your application details, then click "Confirm".

Verify Step 5 / 6

Please verify the following application details.

Declaration

I/We confirm that I am/we are NOT "Restricted Person" ⓘ	Correct
I/We represent and warrant that I am/we are NOT a connected person. ⓘ	Correct

Personal particulars

Set up account under (all currencies) ⓘ	Integrated Account 123-456789-999
Residential address ⓘ	Pr...

Details of accounts

Ceiling limit ⓘ	USD 1,000,000
Top up collateral level	5%
Close out collateral level	3%

[Back](#)

[Confirm](#)

Step 7

Read and confirm the declaration by clicking “Confirm”.

The screenshot displays a web application interface with a modal dialog box. The background is dimmed, showing a sidebar with 'Customer Services' and 'Offers', and a main area with 'Additional collateral account' and 'EUR, CAD'. The modal dialog is titled 'FX2 - FX And Precious Metal Trading Services Application' and contains a list of terms and conditions. At the bottom of the dialog are 'Cancel' and 'Confirm' buttons. The 'Confirm' button is highlighted with a green border. A larger 'Confirm' button is also visible on the right side of the background page.

Customer Services

Offers

Additional collateral account EUR, CAD

FX2 - FX And Precious Metal Trading Services Application

- FX2 - FX And Precious Metal Trading Services terms and conditions
- I will only receive e-Statements / e-Advices for FX & Precious Metal Trading Account, and abc*****@gmail.com is my registered correspondence email address with the Bank to receive e-Statements / e-Advices and other communication related to my FX & Precious Metal Trading Account and other new investment account(s)/sub-account(s) I open in future. [View more](#)
- I hereby authorise the Bank to open in my name the above accounts and agree that such accounts shall be operated in accordance with (i) the [Account Rules](#) of the Bank and the (ii) Terms and Conditions for FX2 – FX And Precious Metal Trading Services Master Agreement published from time to time. I also agree and accept that to the extent of any inconsistency between (i) the [Account Rules](#) and (ii) the Terms and Conditions for FX2 – FX And Precious Metal Trading Services Master Agreement, the latter shall prevail.
- I agree to notify the Bank of any material changes to the information provided in this form.
- I agree that the Bank may use and disclose all personal data about me that the Bank

Cancel Confirm

Confirm

Live Share | [FAQ](#)

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The website is intended for Hong Kong customers. [Cross-border disclaimer](#)

Step 8

Your application instruction is placed successfully. It will take a few business days to proceed your application.

You will receive a welcome call from our staff once the FX2 trading service is ready for use.

Acknowledgement

Step 6 / 6



Instruction received

Reference number: 123456789012

Thank you for your application

Please note that account opening will normally take a few business days and the outcome of account opening will be advised to you via letter.

For any enquiries, please contact us at our Enquiry Hotline: 2913 3388.

You can print or save this acknowledgement page for future reference. Please note that this page is not an official receipt of the transaction.

Personal particulars

Set up account under (all currencies) ⓘ

Integrated Account

123-456789-999

Residential address ⓘ

Residential address: HKD, USD

Investment experience: No

Investment experience

No

Collateral account ⓘ

HKD, USD

Additional collateral account

EUR, CAD

[Investments Overview](#)

Risk Disclosure of FX and Precious Metal Margin Trading Services

- The risk of loss in leveraged foreign exchange and precious metal trading can be substantial. You may sustain losses in excess of your initial margin funds. Placing contingent orders, such as "stop-loss" or "stop-limit" orders, will not necessarily limit losses to the intended amounts. Market conditions may make it impossible to execute such orders. You may be called upon at short notice to deposit additional margin funds. If the required funds are not provided within the prescribed time, your position may be liquidated. You will remain liable for any resulting deficit in your Account. You should therefore carefully consider whether FX and precious metal margin trading is suitable for you in light of your own financial position and investment objectives.
- Renminbi (RMB) is subject to foreign exchange control by the PRC government. If your Margin Trading Contract involves Offshore Renminbi, you will be subject to foreign control and currency risk of RMB.
- Trading on an electronic trading system may differ from trading on other trading systems or platforms. You will be exposed to risks associated with the system including the failure of hardware and software, which could result in your order not being executed according to your instructions or at all.
- Investment involves risks. The above risk disclosure cannot disclose all the risks involved. You should read and understand all the relevant documents and risk disclosure (in particular, the Risk Disclosure Statement contained in the relevant application form) before making any investment decision.
- If you are uncertain of or do not understand the nature of and the risks involved in leveraged foreign exchange and precious metal trading, you should seek independent professional advice.