

**HSBC OPENING QUESTIONNAIRE****Account Holder Details:***Please ensure all details are same as passport and address proof***Full Name in English:**

Full Name in Chinese:

**Passport Number:**

Gender:

Date of Birth:

Nationality:

Reason for setting up  
account in Hong Kong:

- ☐
- Study
- ☐
- Immigration
- ☐
- Work
- ☐
- Invest in HK Stock Market
- 
- ☐
- Pay family expenses in Hong Kong
- ☐
- For direct debit of insurance bought in HK
- 
- ☐
- Others:-

**Employment Status:**

- ☐
- Self-Employed
- ☐
- Full-time Employed
- ☐
- Part-time Employed
- 
- ☐
- Not Currently Employed
- ☐
- Student
- ☐
- Housewife
- ☐
- Retired

**Occupation:****Job Title:**

Employment Start Date:

**Name of Employer:****Business Industry:**

- ☐
- Manufacturing
- ☐
- Finance/Insurance
- ☐
- Import/Export/ Wholesale
- ☐
- Retail
- 
- ☐
- Communication
- ☐
- Business Services
- ☐
- Hotel/Boarding Houses
- ☐
- Public
- 
- Services
- ☐
- Transport
- ☐
- Real Estate
- ☐
- Restaurant
- ☐
- Public Services
- 
- ☐
- Personal and Household Services
- 
- ☐
- Others:-

Monthly Salary (HKD):

- ☐
- below 5,000
- ☐
- 5,000-9,999
- ☐
- 10,000-14,999
- ☐
- 15,000-19,999
- 
- ☐
- 20,000-29,999
- ☐
- 30,000-49,999
- ☐
- 50,000-69,999
- ☐
- 70,000-99,999
- 
- ☐
- 100,000-199,999
- 
- ☐
- 200,000 or above

**Education Level:**

- ☐
- Completed Form 3
- ☐
- Completed Secondary
- ☐
- Post-Secondary
- 
- ☐
- University or above
- ☐
- Others:-

Marital Status:

- ☐
- Single
- ☐
- Married
- ☐
- Divorced
- ☐
- Widowed

**Types of product(s)  
previously invested::**

- ☐
- Bond/CD
- ☐
- Stocks
- ☐
- Unit Trusts
- ☐
- Futures & Options
- ☐
- Derivatives
- 
- ☐
- None
- ☐
- Others:-

Residential Number:

Office Number:

**Mobile Number:****Email Address:**

Residential Address:

Work Address:

**Correspondence Address:**

**HSBC OPENING QUESTIONNAIRE****Optional Features:**

- ☐ One Cheque-book – 30 bearer cheques without counterfoil  
☐ ATM Card

**Account Types:**

*Please select one account type from below*

- ☐ **HSBC Premier Account**
- Dedicated Relationship Manager
  - Global Transfer System
  - Minimum Average Monthly Balance HK\$1,000,000 (otherwise monthly charges will be incurred)
- ☐ **HSBC Advance**
- Emergency Assistance at any HSBC branch worldwide
  - Minimum Average Monthly Balance HK\$200,000 (otherwise monthly charges will be incurred)
- ☐ **SmartVantage**
- Minimum Average Monthly Balance HK\$10,000 (otherwise monthly charges will be incurred)
  -

**Terms of Business**

1. The signer instructing Alcott Liu CPA Limited ("ALCPA") to assist and:
  - Undertake to notify ALCPA immediately in writing of any error and changes before the submission of the documents to ALCPA;
  - Confirms that he/she is aware of the existence anti-money laundering duties/obligations of ALCPA in the relevant jurisdiction and undertake to fully provide, notify and assist ALCPA in the application process;
  - Agrees to settle immediately on receipt ALCPA's invoice;
  - Agrees that ALCPA shall not be liable for any penalties, fines, fees or other liabilities incurred by the signer because of late payment from his/her part;
  - Agrees to hold ALCPA harmless and indemnify ALCPA's officers and employees from all and any claims, actions, suits, proceedings, demands and costs that may be brought against; and
2. Except where obliged by applicable law, ALCPA will not divulge to any third party any information concerning the signer without the prior written consent.

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_