

If you are an HSBC User for an SMSF, Trust or Non-Trading Entity please complete this form to amend the service options, or link accounts.

 Mail the completed form to: **GPO Box 5302, SYDNEY NSW 2001** **OR**  Fax to: **1300 765 150**

## ENTITY DETAILS

Entity customer number (9 digits)

Registered name

ABN (if applicable)

Contact phone number

Postal address – Documents relating to the services will be mailed to this address

Postcode

## USER DETAILS

Title

First name(s)

Surname

Personal Banking Number (10 digits)

## ACCOUNT ACCESS

Add/Remove the following accounts to/from the User Phone Banking access

Access	BSB Number	Account Number
Add <input type="checkbox"/> Remove <input type="checkbox"/>		
Add <input type="checkbox"/> Remove <input type="checkbox"/>		
Add <input type="checkbox"/> Remove <input type="checkbox"/>		
Add <input type="checkbox"/> Remove <input type="checkbox"/>		

## AMENDMENTS TO SERVICE OPTIONS

All services are automatically included when you set up Phone Banking. If you wish to restrict Phone Banking access, indicate the required services below.

**Note:** this applies to both automated and agent assisted services.

Service Level		Description
Add	Remove	
<input type="checkbox"/>	<input type="checkbox"/>	Transfer between your linked HSBC Australian accounts and update Term Deposit maturity instructions (including Foreign Exchange transactions if relevant). Limit AUD 500,000 *
<input type="checkbox"/>	<input type="checkbox"/>	Automated: Transfer to an HSBC Australian 3rd party account. Limit AUD 3,000 *
<input type="checkbox"/>	<input type="checkbox"/>	Enquire on balances and recent transactions
<input type="checkbox"/>	<input type="checkbox"/>	BPAY® payments. Limit AUD 20,000 *

\* Further details of daily Phone Banking limits are contained in the relevant product disclosure statement for the underlying deposit product.

## SERVICE ACCESS

For the **Entity as a whole**, please indicate if you want to:

Cancel this Service ☐ Temporarily suspend this Service ☐ From  To

## DECLARATION AND AUTHORISATION

By signing below, the Account holder hereby acknowledges and agrees the following:

- This form contains its instructions to HSBC about how a User is authorised by the Account holder to use the Phone Banking Service to administer and transact on the Account, and that, solely with respect to the Account holder's use of the Phone Banking Service, where the instructions contained in this document are different from any authorisation set out in the Mandate for Accounts or other instructions relating to its Accounts, the instructions in this document will prevail.
- The Account holder will be liable for any User's use of the Phone Banking Service in the same manner as it is liable for the actions of Authorised Signatories and/or Users in the Mandate for the Accounts.
- The Phone Banking Service is subject to the terms and conditions contained in the relevant product disclosure statement or terms and conditions for the underlying product.

### Who needs to sign this form

1. If you are a trust, all the trustees must sign this document in accordance with the trust deed. If the trustee is a company, also refer to point 2 below as to how each director signs.
2. If you are a company and there is only one director who is also the only company secretary, that director must sign; if there are two or more directors, either two directors or a director and a company secretary can sign.
3. If you are in a partnership formed by individuals, each and every individual partner must sign.

### SIGNATORY 1

Signature

X

Date

DD / MM / YY

Name

Office/Title

### SIGNATORY 2

Signature

X

Date

DD / MM / YY

Name

Office/Title

For multiple signatories, please attach extra pages for the additional signatures.

### Office Use Only

SV <input type="checkbox"/>	Checking officer name		Signature		Date	/	/
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