



Registration for advisor access

General notes for completing this registration

- ◆ Use this form to register for access to Investor Insight as an advisor. Complete all sections, print and sign the completed form, and attach a copy of your company authorised signatory list. Post all documents to your local Investor Services team
- ◆ Once your registration has been processed, each new user will receive an e-mail with details of how to access to Investor Insight

* Required information

Section 1 – Company details

Company name *

Registered company no *

Registered address *

City/State *

Country * Postcode

Organisation type * Advisor Distributor/Trustee
 Other (please specify)

Section 2 – Individual details

List all individuals that require Investor Insight access (enclose a separate list if required).

Please note:

- ◆ Individuals must have a unique corporate email address. Generic users, shared or public e-mail addresses are not permitted
- ◆ You must notify your local Investor Services team if any listed individual leaves the organisation, or no longer requires access to Investor Insight
- ◆ Individuals must adhere to HSBCnet E-Channels Security Measures. Refer to terms and conditions in Section 4 of this form for further information

First name	Last name	Job title	E-mail address
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Section 3 – Fund registration details

Please tick one of the following options:

- Access is required as part of a new agency arrangement (please enclose this form with your agency arrangement documents)
- An existing agency arrangement is in place.

Please provide details of all agent records that individuals listed in Section 2 require access to.

Agent identifier	Agent name	Fund manager name
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

If access requirements are not the same for all individuals, please contact your local Investor Services team to discuss your requirements.

Section 4 – Terms and conditions

Investor Insight is an online portal accessed through HSBCnet, provided by HSBC Bank plc. Usage of Investor Insight is governed by the HSBCnet General Website Terms and Conditions, including the E-Channels Security Measures, which you can find at <http://www.hsbcnet.com>. The E-Channels Security Measures terms 'Profile Owner' and 'User' shall be read to refer to the Investor Insight registered user, and shall not imply or offer the registered user a separate E-Channels profile.

No member of the HSBC Group makes any guarantee, representation or warranty, and no member takes any responsibility as to the accuracy or completeness of information provided on Investor Insight.

Information you provide to us will be used as explained in the HSBCnet Privacy and Data Protection Statement. You can find this at <http://www.hsbcnet.com>.

Declaration

By signing below you are requesting Investor Insight access for Individuals listed in Section 2, and authorising members of HSBC Group to use the information you have provided to verify your identity, and the identity of relevant authorised signatories. You are also confirming acceptance of the Investor Insight terms and conditions.

If additional signatures are required, please provide a separate written confirmation signed in accordance with your mandate.

Authorised signatory 1	<input type="text"/>	Authorised signatory 2 (if applicable)	<input type="text"/>																
Full name	<input type="text"/>	Full name	<input type="text"/>																
Date:	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y	Date:	<table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
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