

**HSBC Power Vantage Customer Information Form**

(翻訳：香港上海銀行パワーバンテージ顧客情報様式)

\* 正式な様式は英文のものをご使用ください。

I. Main Account Holder (メインのアカウント保持者)

Please fill out the following in English and bring to HSBC:

(あらかじめ以下の項目を英語で記入し、HSBCにご持参ください。)

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_  
(苗字) (名前)

Mr. \_\_\_\_\_ Mrs. \_\_\_\_\_ Miss \_\_\_\_\_ Ms. \_\_\_\_\_ Other \_\_\_\_\_

Gender: Male \_\_\_\_\_ Female \_\_\_\_\_  
(性別) 男性 女性

Date of Birth (day/month/year): \_\_\_\_\_  
(生年月日) 日/月/年

Nationality: \_\_\_\_\_  
(国籍)

Employment Status: Self-Employed \_\_\_\_\_ Full-time Employed \_\_\_\_\_  
(就業状況) 自営業 会社員

Part-time Employed \_\_\_\_\_ Not Currently Employed \_\_\_\_\_ Student \_\_\_\_\_  
パートタイム 現在無職 学生

Housewife \_\_\_\_\_ Retired \_\_\_\_\_  
主婦 引退

For self-employed, full-time employed or part-time employed customers, please complete the following:

自営業、会社員、パートタイムの方は以下をすべての項目にわたりご記入ください。

Job Nature: \_\_\_\_\_  
(仕事の種類)

Job Title: \_\_\_\_\_  
(仕事上の地位：タイトル)

Employment Start Date (Month/Year): \_\_\_\_\_  
就業開始時期 (月/年)

Employer/Business Name: \_\_\_\_\_  
(雇用主、会社名)

Employer/Business Industry (雇用主、会社の業種) Manufacturing (製造)  
\_\_\_\_\_ Construction (建設) \_\_\_\_\_ Transport (運輸) \_\_\_\_\_ Hotel (ホテル)

\_\_\_\_\_ Import/Export (貿易) \_\_\_\_\_ Communications (通信) \_\_\_\_\_ Real Estate (不動産) \_\_\_\_\_  
Personal & Household Services (個人向けおよびハウスマードサービス) \_\_\_\_\_ Wholesale (卸業) \_\_\_\_\_ Restaurants (レストラン)

\_\_\_\_\_ Finance/Insurance (金融保険) \_\_\_\_\_ Business Services (ビジネスサービス) \_\_\_\_\_  
Retail (小売) \_\_\_\_\_ Public Services (公務員) \_\_\_\_\_ Others (その他) \_\_\_\_\_

Monthly Salary (HKD): \_\_\_\_\_  
(月々の給与...香港ドルで記入)

Monthly Non-Salary (HKD): \_\_\_\_\_

(月々の給与以外の収入...香港ドルで記入)

Education Level: Completed Secondary \_\_\_\_\_ Post-Secondary \_\_\_\_\_

University or above \_\_\_\_\_ Other \_\_\_\_\_

Marital Status: Single \_\_\_\_\_ Married \_\_\_\_\_ Divorced \_\_\_\_\_ Widowed \_\_\_\_\_

(結婚の状況) 独身 既婚 離婚 死別

Contact Telephone Number: Home: \_\_\_\_\_

(電話番号) 自宅 (+81- から始まります)

Office: \_\_\_\_\_ Mobile: \_\_\_\_\_

職場 携帯

Contact Fax Number:

(ファックス番号)

Home: \_\_\_\_\_ Office: \_\_\_\_\_

自宅 職場

Email Address: \_\_\_\_\_

E-mail アドレス

Home Address: \_\_\_\_\_

自宅住所

Office Address: \_\_\_\_\_

職場、会社住所

Language Preference: English \_\_\_\_\_ Cantonese \_\_\_\_\_ Putonghua \_\_\_\_\_

(希望の言語) 英語 広東語 標準北京語

Number of People in Household: \_\_\_\_\_

(家族数)

Number of Children: \_\_\_\_\_

(子供数)

Year of Birth of Children: \_\_\_\_\_

(子供の生まれた年....複数の場合複数)

Household Income (HK Dollars)(世帯の合計収入 : 香港ドル換算): 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 \_\_\_\_\_

Home Status (住居の状況) : Rented (賃貸) - Monthly Rent(月家賃...香港ドル換算 (HKD)) \_\_\_\_\_

Living with Relative (親族と同居) \_\_\_\_\_ Company Provided (社宅)

Self-Owned (Without Mortgage) 自己所有無担保 \_\_\_\_\_

Self-Owned (With Mortgage) 自己所有担保付- Monthly Mortgage Payment 月々の返済額(HKD): \_\_\_\_\_

Other(その他) \_\_\_\_\_

Do you have a banking relationship with HSBC in another country?

香港以外の国でHSBCとの取引がありますか?

Yes (please specify the main country) はい (その国名)

No(いいえ) \_\_\_\_\_

II. Jointed Account Holder (共同名義人)

共同名義人がある場合(例えば配偶者等)以下同様に記入してください。  
Please fill out the following in English and bring to HSBC (same information as the main account holder):

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Mr. \_\_\_\_\_ Mrs. \_\_\_\_\_ Miss \_\_\_\_\_ Ms. \_\_\_\_\_ Other \_\_\_\_\_

Gender: Male \_\_\_\_\_ Female \_\_\_\_\_

Date of Birth (day/month/year): \_\_\_\_\_

Nationality: \_\_\_\_\_

Employment Status: Self-Employed \_\_\_\_\_ Full-time Employed \_\_\_\_\_  
Part-time Employed \_\_\_\_\_ Not Currently Employed \_\_\_\_\_ Student \_\_\_\_\_  
Housewife \_\_\_\_\_ Retired \_\_\_\_\_

For self-employed, full-time employed or part-time employed customers, please complete the following:

Job Nature: \_\_\_\_\_

Job Title: \_\_\_\_\_

Employment Start Date (Month/Year): \_\_\_\_\_

Employer/Business Name: \_\_\_\_\_

Employer/Business Industry: Manufacturing \_\_\_\_\_ Construction \_\_\_\_\_  
Transport \_\_\_\_\_ Hotel \_\_\_\_\_ Import/Export \_\_\_\_\_ Communications \_\_\_\_\_  
Real Estate \_\_\_\_\_ Personal & Household Services \_\_\_\_\_ Wholesale \_\_\_\_\_  
Restaurants \_\_\_\_\_ Finance/Insurance \_\_\_\_\_ Business Services \_\_\_\_\_  
Retail \_\_\_\_\_ Public Services \_\_\_\_\_ Others \_\_\_\_\_

Monthly Salary (HKD): \_\_\_\_\_

Monthly Non-Salary (HKD): \_\_\_\_\_

Education Level: Completed Secondary \_\_\_\_\_ Post-Secondary \_\_\_\_\_  
University or above \_\_\_\_\_ Other \_\_\_\_\_

Marital Status: Single \_\_\_\_\_ Married \_\_\_\_\_ Divorced \_\_\_\_\_ Widowed \_\_\_\_\_

Contact Telephone Number: Home: \_\_\_\_\_

Office: \_\_\_\_\_ Mobile: \_\_\_\_\_

Contact Fax Number:

Home: \_\_\_\_\_ Office: \_\_\_\_\_

Email Address: \_\_\_\_\_

Home Address: \_\_\_\_\_

Office Address: \_\_\_\_\_

Language Preference: English \_\_\_\_\_ Cantonese \_\_\_\_\_ Putonghua \_\_\_\_\_

Number of People in Household: \_\_\_\_\_

Number of Children: \_\_\_\_\_

Year of Birth of Children: \_\_\_\_\_

Household Income (HK Dollars): 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 \_\_\_\_\_

Home Status: Rented – Monthly Rent (HKD) \_\_\_\_\_

Living with Relative \_\_\_\_\_ Company Provided \_\_\_\_\_

Self-Owned (Without Mortgage) \_\_\_\_\_

Self-Owned (With Mortgage) - Monthly Mortgage Payment (HKD): \_\_\_\_\_

Other \_\_\_\_\_

Do you have a banking relationship with HSBC in another country?

Yes (please specify the main country) \_\_\_\_\_

No \_\_\_\_\_

### III. Investment Account Questionnaire

(投資口座のための質問)

Please fill out the following information in English if you wish to use your Power Vantage account to buy/sell stocks, bonds, or other investments:

パワーバンテージ口座を利用して株式、債券、その他の投資商品を売買されたい場合は以下の内容を英語で記入してください。

Types of product(s) you have previously invested (please choose one or more):

今までに投資した商品のタイプ (1つ以上選択)

Bonds/CD (債権/定期性預金) \_\_\_\_\_ Stocks (株式) \_\_\_\_\_ Unit Trusts (ユニ

ット型投資信託) \_\_\_\_\_ Futures & Options (先物オプション) \_\_\_\_\_

Derivatives (デリバティブ) \_\_\_\_\_ None (無し) \_\_\_\_\_

Years of Investment Experience(投資経験年数): Less than 1 year (1年以内)

\_\_\_\_\_ 1 – 4 years \_\_\_\_\_ 5 – 10 years \_\_\_\_\_ More than 10 years(十年以上)

Investment Objectives(投資の目的): Speculation (投機) \_\_\_\_\_ Capital

Appreciation (資本の増価) \_\_\_\_\_ Regular Income (定期収入のため) \_\_\_\_\_

Financial Situation(資産状況) : :

Less than or equal to HKD 500,000 以下 \_\_\_\_\_ HKD500,001 to HKD1,000,000  
\_\_\_\_\_ HKD1,000,001 to HKD5,000,000 \_\_\_\_\_ HKD5,000,001 or above 以上  
\_\_\_\_\_

Note: HSBC may use the above investment information to market financial products to you.

ご注意) HSBC では上記の情報を金融商品ご紹介のため使用させていただく場合があります。

コメント:

さて、記入いただくのもなかなか大変と思いますが、出来るだけ詳しく正確に記入していただくことによって、窓口での手続き時間がぐっと減ります。

- 記入はすべて英文でお願いします。したがって記入する様式は 英文のもののみをご使用ください。この様式(翻訳付)の様式は使用しないでください。
- 金額は口座開設時の香港ドル(HKD)換算で記入をお願いします。自己申告なので概算で構いません。
- 共同名義、例えば、配偶者などと共同で口座を登録しておきますと、HSBC 香港の窓口でどちら様のサイン一つで取引をすることが出来ます。
- 仕事の種類の項は例えば、会社員であれば Company Employee, また会社役員であれば Company Officer などと記入しておき、タイトルは例えば、Manager, Director, President 等
- また会社名の欄には現在お勤めの会社名を記入ください。
- 業種の欄にはいかにも香港らしい業種が記入されています。該当しない場合はその他(Other)にチェックをし、たとえば、Software, Publication (出版)、Press(新聞)等ご記入ください。