Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Important Reminder

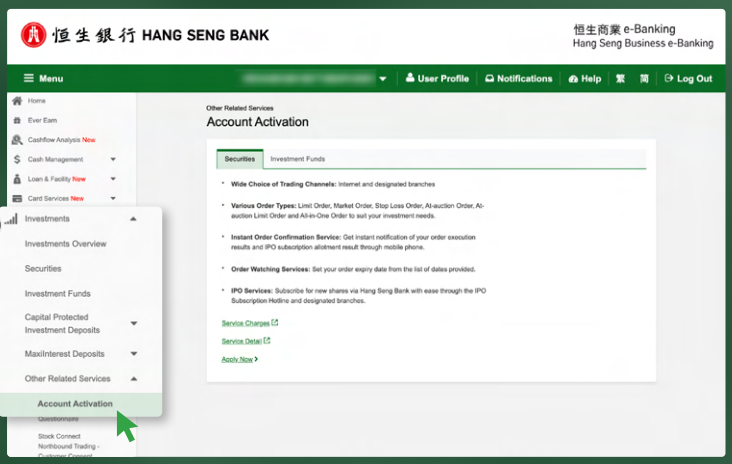
Only **Primary User** of the Hang Seng Business e-Banking **Principal Company** profile can apply for the Securities/Investment Funds account activation.

If you are unable to proceed the account activation, please contact your Relationship Manager or call our Customer Service Representatives at (852) 2198 8000.

Steps for Activating Securities/Investment Funds Account

STEP 1 Open the Page

1. Click **Investment** > **Other Related Services** > **Account Activation** on the side menu after logging in to Hang Seng Business e-Banking.



Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Steps for Activating Securities/Investment Funds Account

STEP 2

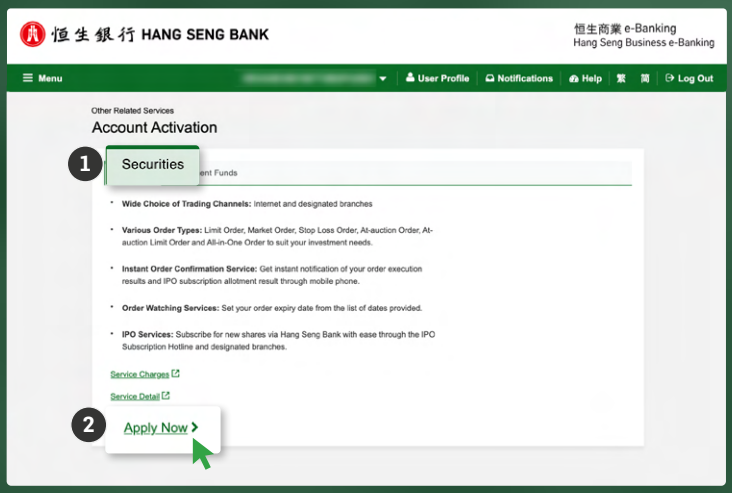
Select the Account Type

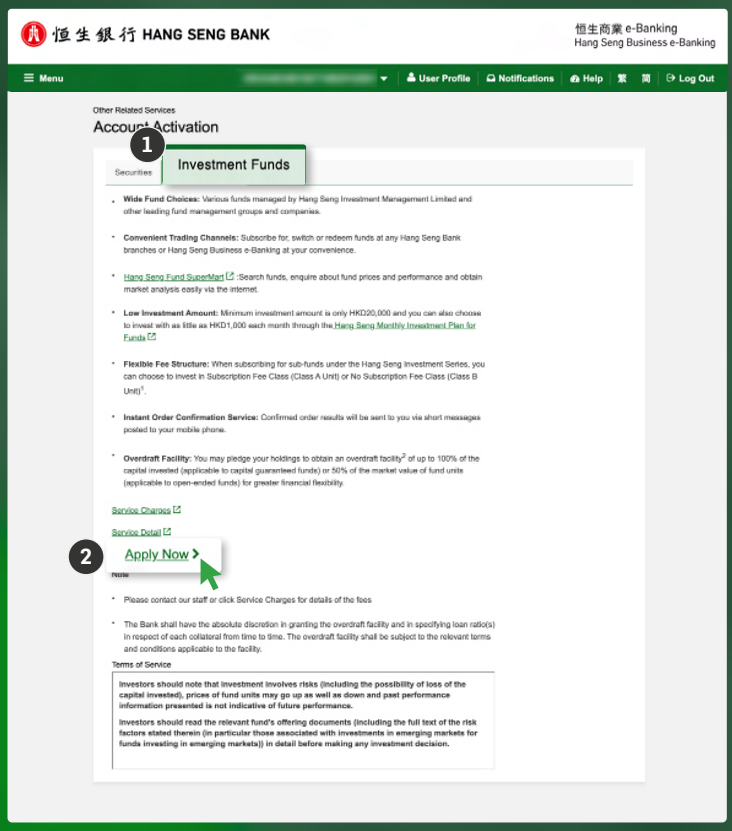
1. Select to activate **Securities Account** or **Investment Funds Account** based on your needs.

2. Read the details and click **Apply Now**.

To activate Securities Account, please go to Section A.

To activate Investment Funds Account, please go to Section B.





Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Section A: Activate Securities Account

STEP 3

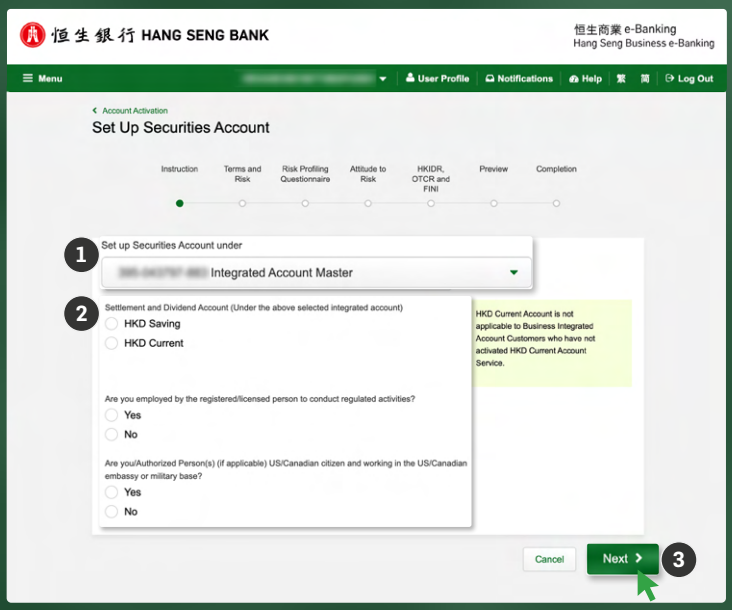
Provide the Details

1. Select an Integrated Business Solutions Account to establish a Securities Account.

2. Select the applicable answers.

3. Click **Next** to continue.

*Note:
Only Integrated Business Solutions (IBS) Account(s) under the Principal Company can be selected.



Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Section A: Activate Securities Account

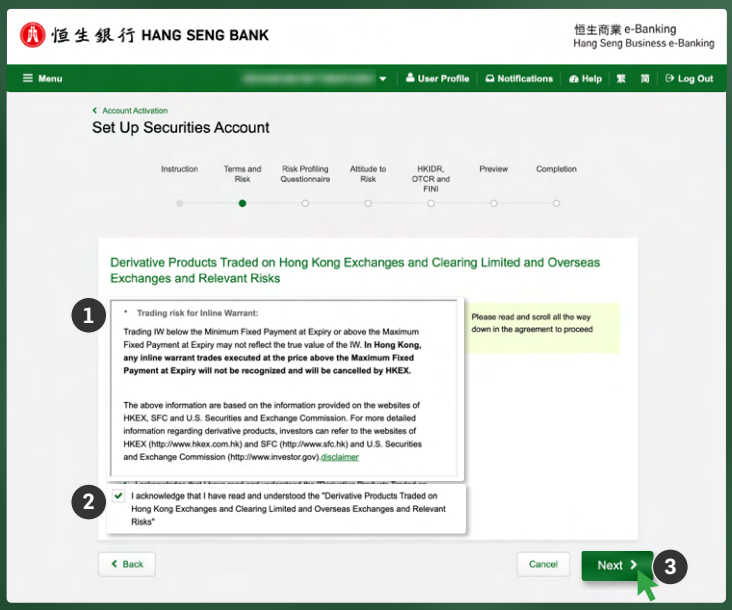
STEP 4

Read the Terms and Risk

1. Scroll all the way down and read all terms.
2. Tick the box to confirm your acceptance of the **Terms and Risks**.
3. Click **Next** to continue.

If you have not previously submitted the Risk Profiling Questionnaire, or if it has expired, please go to Step 5.

If you have already submitted Risk Profiling Questionnaire, please go to Step 7.

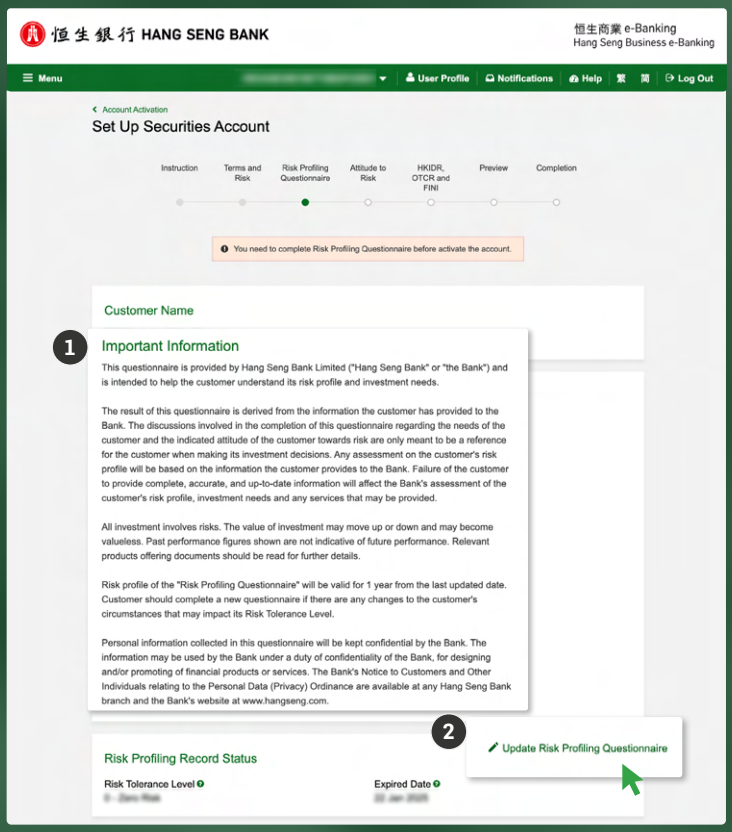


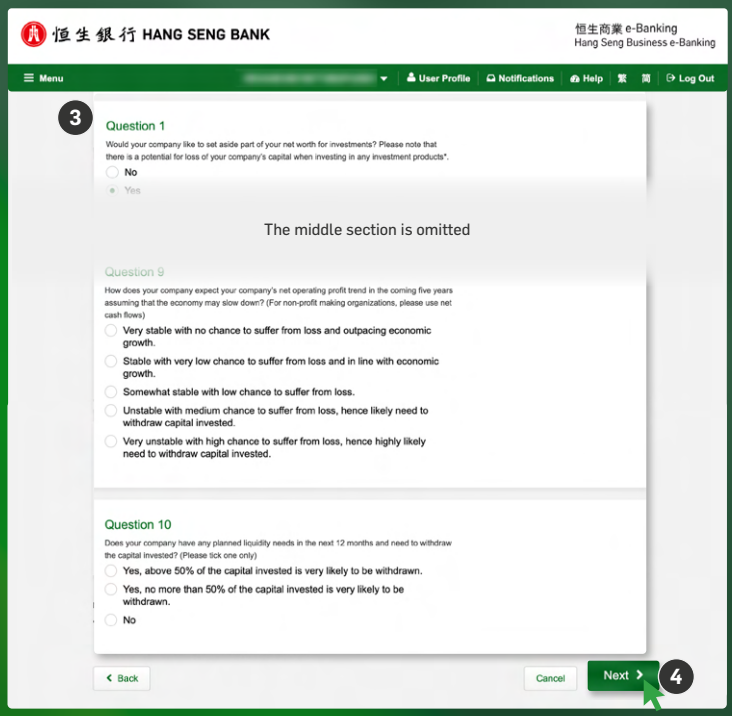
Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Section A: Activate Securities Account

STEP 5 Fill in Risk Profiling Questionnaire

1. Read the **Important Information**.
2. Click **Update Risk Profiling Questionnaire**.
3. Complete the questionnaire.
4. Click **Next** to continue.





Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

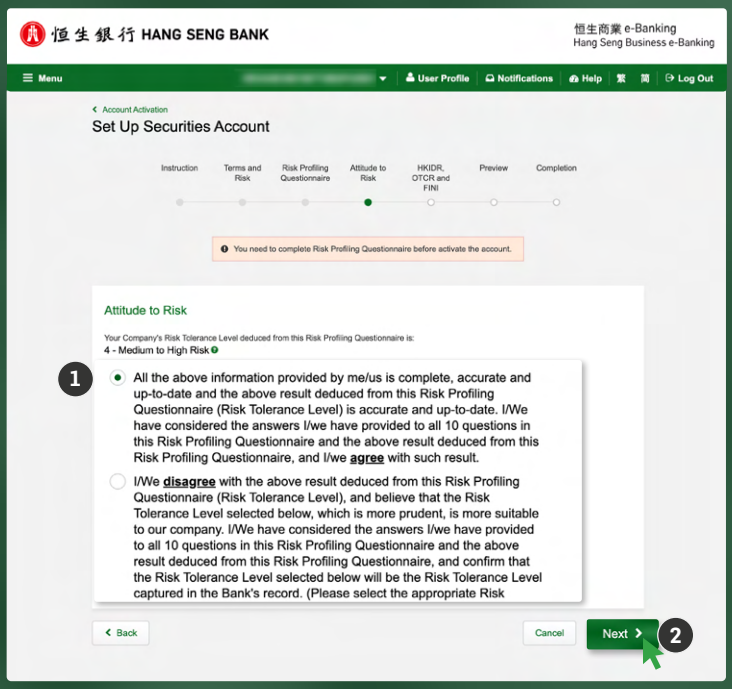
Section A: Activate Securities Account

STEP 6 Your Attitude to Risk

1. Review your Risk Tolerance Level and select your **Attitude to Risk**.

2. Click **Next** to continue.

*Note:
If the Risk Tolerance Level is Zero, this page will not be shown.



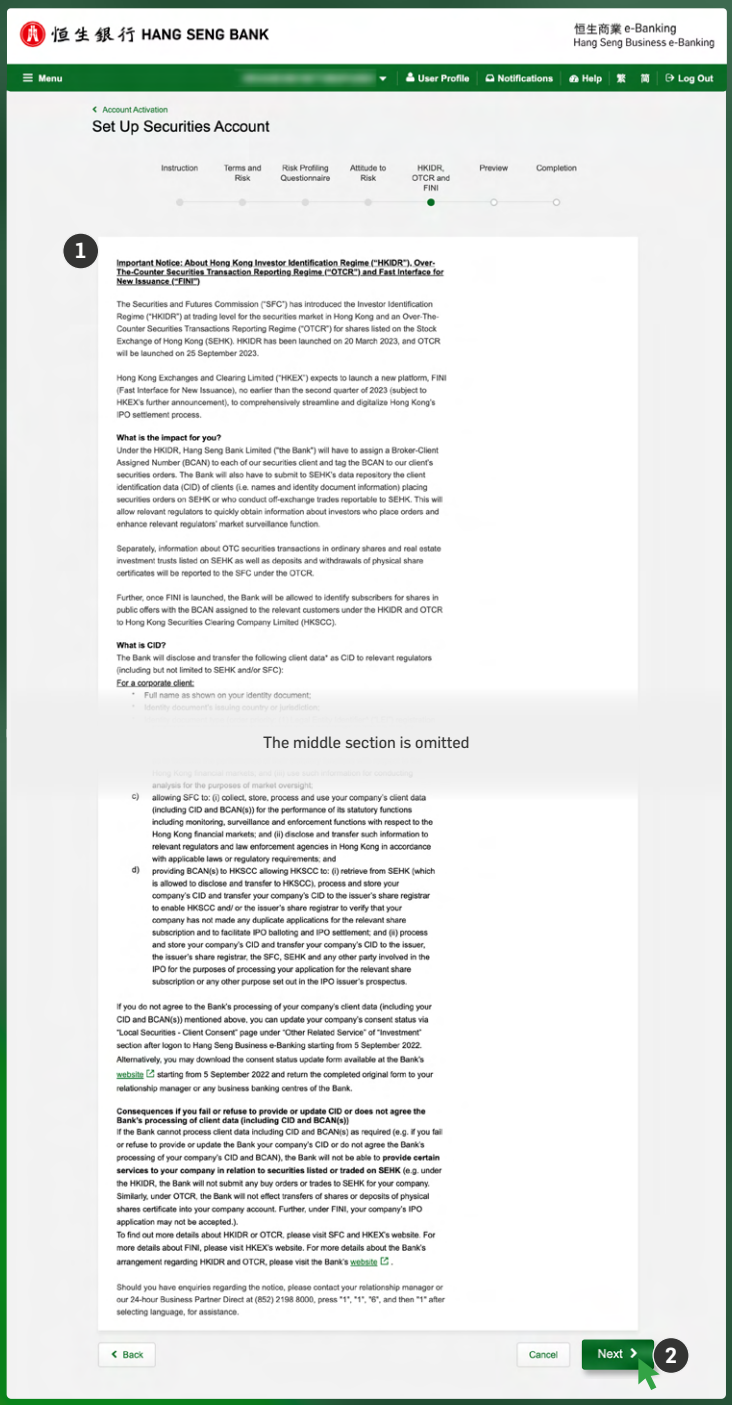
Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Section A: Activate Securities Account

STEP 7 Read the Important Notice

1. Read through all the information, including HKIDR, OTCR and FINI.

2. Click **Next** to continue.

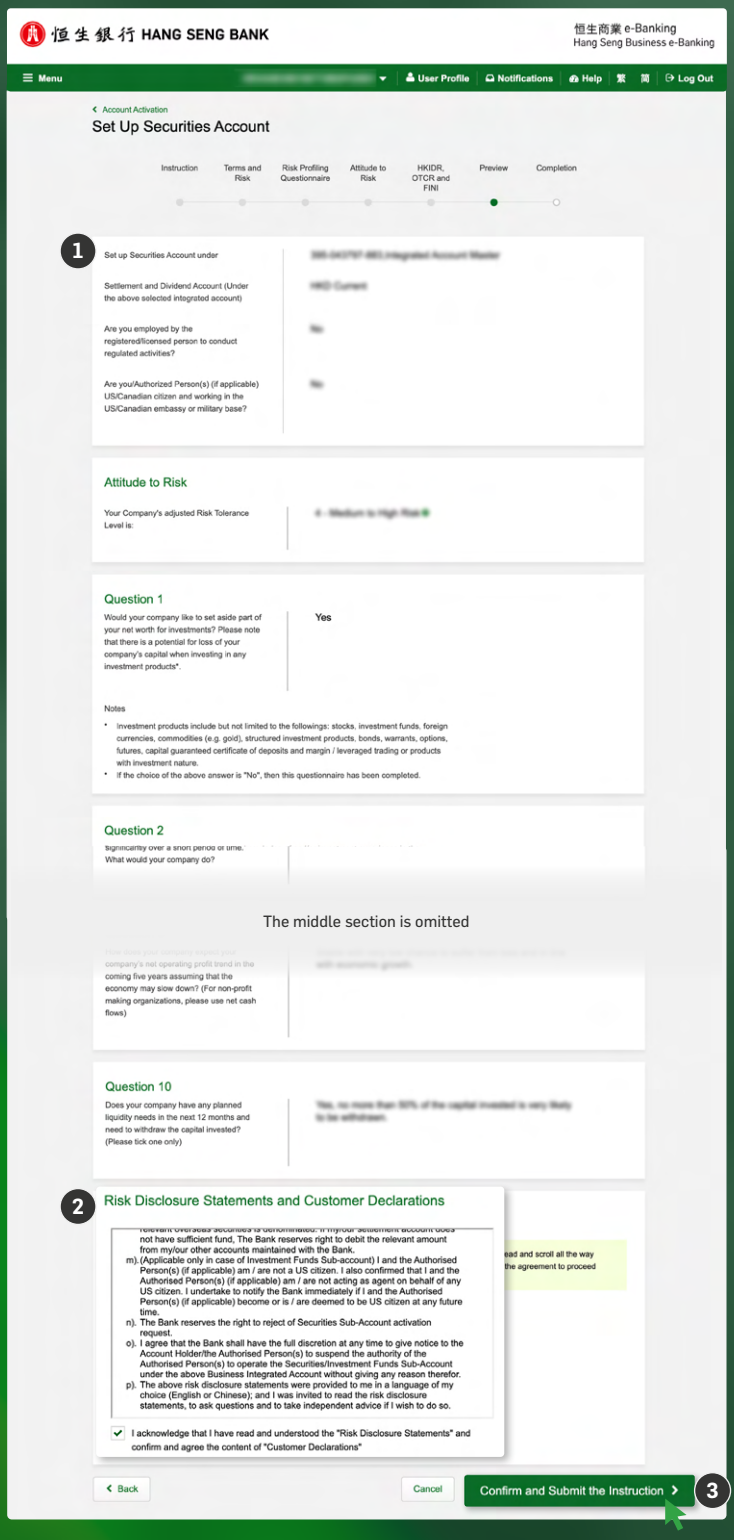


Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Section A: Activate Securities Account

STEP 8 Review the Instruction

1. Check and make sure all the details are correct.
2. Scroll all the way down and read all terms. Tick the box to confirm your acceptance of the Risk Disclosure Statements and Customer Declarations.
3. Click **Confirm and Submit the Instruction**.



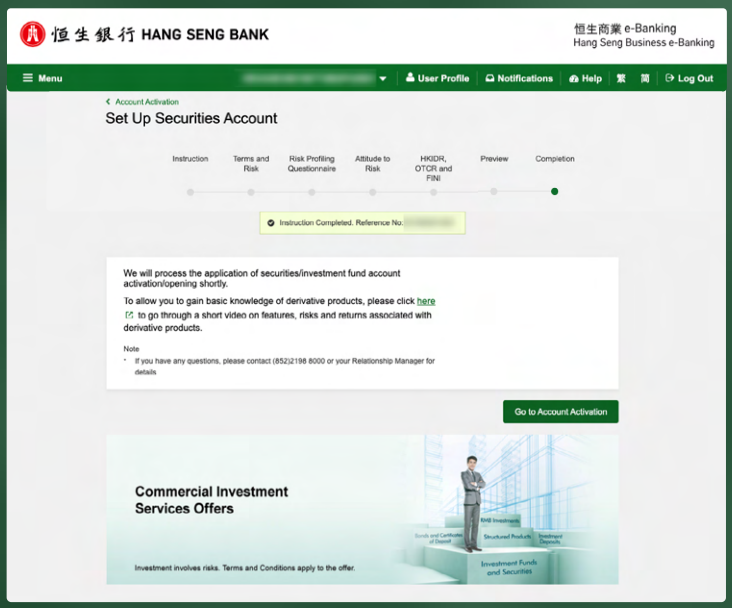
Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Section A: Activate Securities Account

STEP 9

Completion

You have submitted the instruction successfully. **Your Securities Account** will be effective after 2 working days under normal circumstances.



Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Section B: Activate Investment Funds Account

STEP 3

Provide the Details

1. Select an Integrated Business Solutions Account to establish an Investment Funds Account.

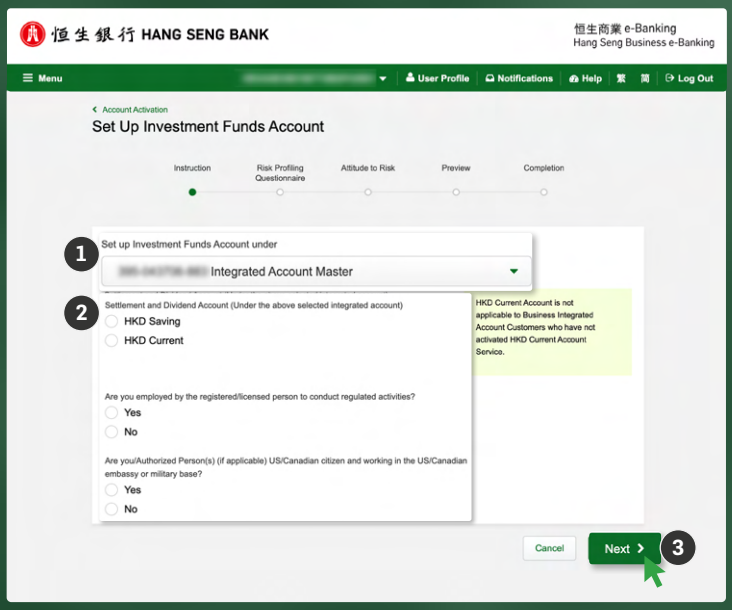
2. Select the applicable answers.

3. Click **Next** to continue.

If you have not previously submitted the Risk Profiling Questionnaire, or if it has expired, please go to Step 4.

If you have already submitted Risk Profiling Questionnaire, please go to Step 6.

*Note:
Only Integrated Business Solutions (IBS) account(s) under the Principal Company can be selected.

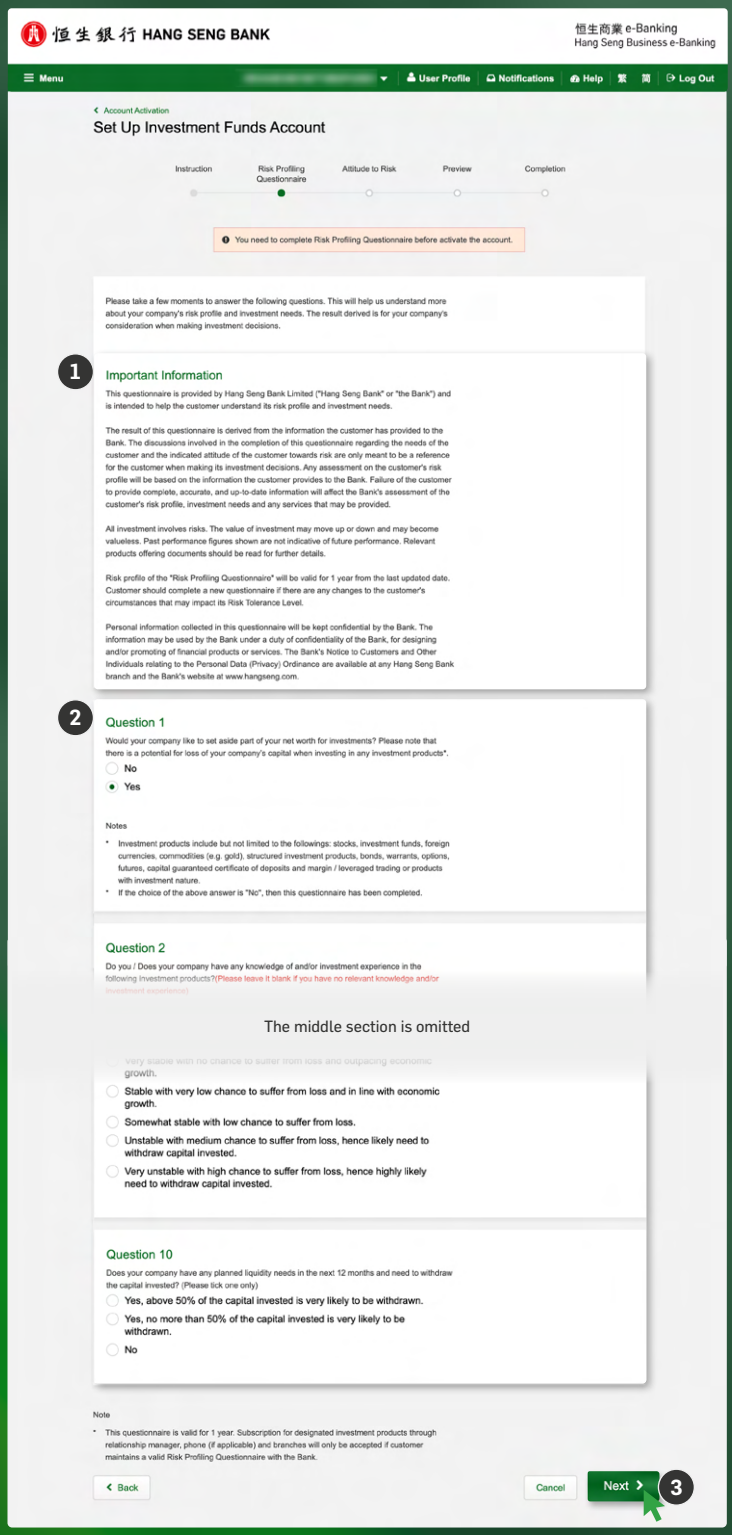


Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Section B: Activate Investment Funds Account

STEP 4 Fill in Risk Profiling Questionnaire

1. Read the **Important Information**.
2. Complete the questionnaire.
3. Click **Next** to continue.



Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

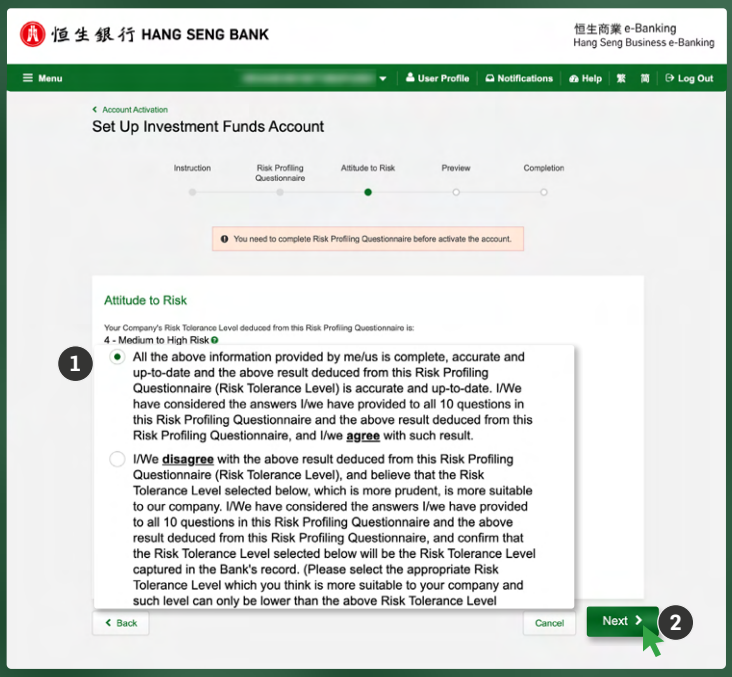
Section B: Activate Investment Funds Account

STEP 5 Your Attitude to Risk

1. Review your Risk Tolerance Level and select your **Attitude to Risk**.

2. Click **Next** to continue.

*Note:
If the Risk Tolerance Level is Zero, this page will not be shown.

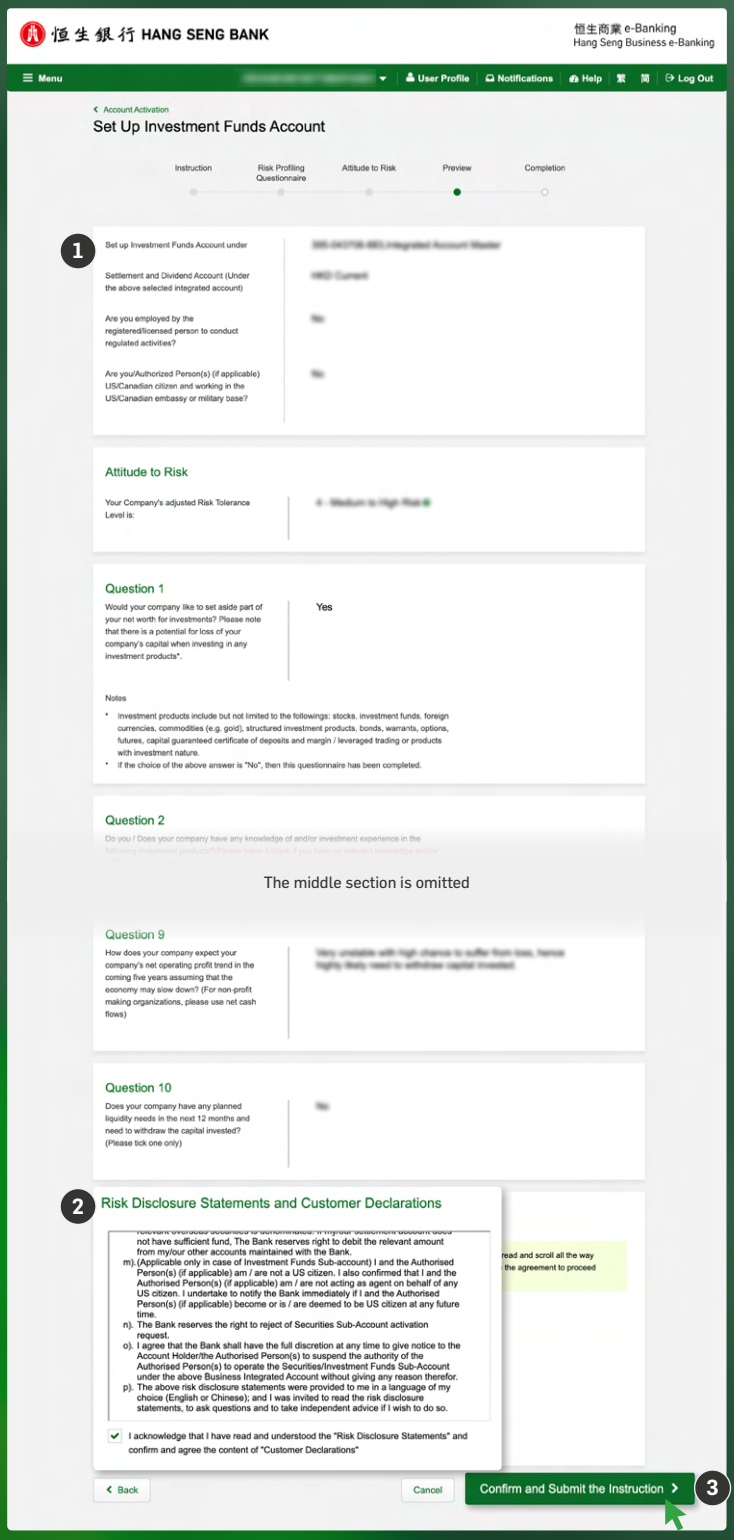


Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Section B: Activate Investment Funds Account

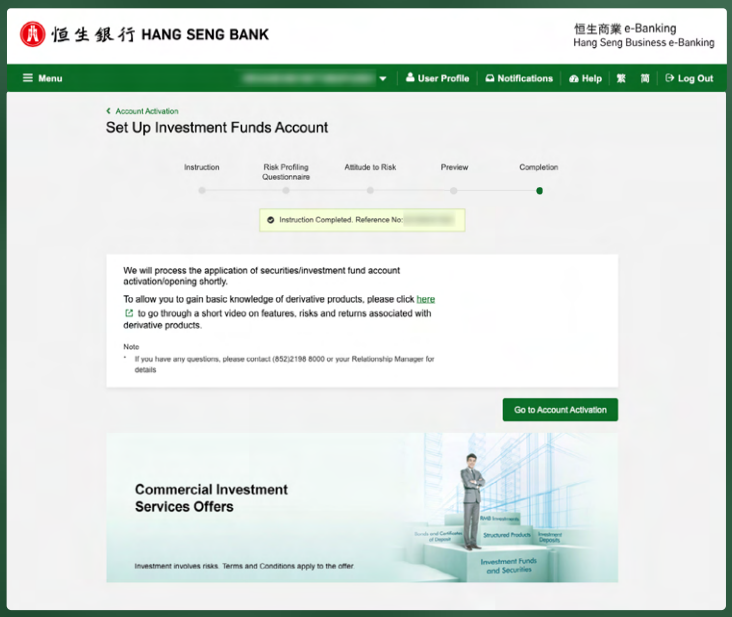
STEP 6 Review and Submit the Instruction

1. Check and make sure all the details are correct.
2. Scroll all the way down and read all terms. Tick the box to confirm your acceptance of the **Risk Disclosure Statements and Customer Declarations**.
3. Click **Confirm and Submit the Instruction**.



Hang Seng Business e-Banking User Guide
Securities/Investment Funds Account Activation

Section B: Activate Investment Funds Account

STEP 7 Completion

You have submitted the instruction successfully. The account will be effective on the same working day.