

# OPTIONAL SERVICES BOOKLET

The Hongkong and Shanghai Banking Corporation Limited, India

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## HELP US SERVE YOU BETTER

The Hongkong and Shanghai Banking Corporation Limited, India (HSBC)

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

City: \_\_\_\_\_ State: \_\_\_\_\_

Contact number(s): Residence: \_\_\_\_\_ Office: \_\_\_\_\_ Mobile: \_\_\_\_\_

E-mail: \_\_\_\_\_

I would like to know more about the Business Current Account<sup>1</sup>.

I would like to know more about an HSBC Home Loan / Loan Against Property<sup>2</sup>.

I would like you to help me draw up a Financial Plan using a combination of following products, that would aid me in achieving my financial goals.

Deposits

Mutual funds<sup>3</sup> / Systematic investment plan<sup>3</sup>

Life insurance<sup>4</sup>

I would like to know more about Financial Market Investment Opportunities available.

I would like HSBC to help me with an Auto Insurance<sup>4</sup> for my car \_\_\_\_\_ (make/model) which is expiring in \_\_\_\_\_ (mm/yyyy) and assist me in renewing it.

I would like to know more about the Health Insurance Plans<sup>4</sup> offered through HSBC.

I would like to know more about the Home Insurance<sup>4</sup> plan offered through HSBC.

### Optional Section

#### 1. Marketing Offers:

From time to time, HSBC communicates various features/products/promotional offer which provide significant benefits to its customers and may use the services of third party agencies to do so. Do you wish to be informed about such benefits?

I/We expressly authorise HSBC to use information or data relating to me/us, for communicating marketing offers as outlined above.

No, I/we do not wish to receive offers as outlined above.

For customers who wish to receive such marketing offers, but do not wish to be communicated the same by way of telephone calls/SMSes from HSBC, we offer a 'Do not call' service. To register for this, please visit our website [www.hsbc.co.in](http://www.hsbc.co.in)

I/We expressly authorise HSBC to give or make available to any member of the HSBC Group, information or data relating to me/us, whether provided by me/us or otherwise, in connection with the offer, sale or distribution of products and services offered by such entities, in which I/we have expressed interest. I/We understand that my/our information will be protected by a strict code of secrecy and security to which all members of the HSBC Group and their staff are subject to.

#### 2. Assignment of Activities to Third Party Agencies:

I/We acknowledge that HSBC remains entitled to assign any activities to any third party agencies/service providers at its sole discretion. I/We further acknowledge the right of HSBC to provide details of my/our account and sharing or transfer of information, which will be on a confidential basis to HSBC Group offices or other third party agencies/service providers, whether located in India or overseas for the purpose of availing of support services of any nature by HSBC, and also may disclose information if required or permitted by any law, rule or regulation or at the request of any public or regulatory authority or if such disclosure is required for the purposes of preventing fraud, without any further specific consent or authorisation from me/us.

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

Disclaimer

<sup>1</sup>Terms and Conditions apply.

<sup>2</sup>Terms and Conditions apply. All loans shall be at the sole discretion of The Hongkong and Shanghai Banking Corporation Limited, India. Loans available for applicants and properties in Mumbai, New Delhi (NCR), Bengaluru and Chennai.

<sup>3</sup>Mutual funds are subject to market risk. Please read the offer document carefully before investing.

<sup>4</sup>Insurance is a subject matter of solicitation.

Office Use Only

Employee code: \_\_\_\_\_ Branch code: \_\_\_\_\_

Campaign code: \_\_\_\_\_ SE code: \_\_\_\_\_

Account no.: \_\_\_\_\_ Account type: \_\_\_\_\_





# FORM No. 60

The Hongkong and Shanghai Banking Corporation Limited, India (HSBC)

[See second proviso to rule 114B]

Form of declaration to be filled by a person who does not have a Permanent Account Number (PAN) and who enters into any transaction specified in rule 114B.

1. Full name and address of the declarant: \_\_\_\_\_
2. Particulars of transaction: \_\_\_\_\_
3. Amount of the transaction: \_\_\_\_\_
4. Are you assessed to tax?       Yes       No
5. If yes,
  - (i) Details of Ward/Circle/Range where the last return of income was filed?
  - (ii) Reasons for not having Permanent Account Number (PAN)?
6. Details of the document being produced in support of address in column (1)

## Verification

I, \_\_\_\_\_ do hereby declare that what is stated above is true to the best of my knowledge and belief.

Verified today, the \_\_\_\_\_ day of \_\_\_\_\_.

Date \_\_\_\_\_

Place \_\_\_\_\_

\_\_\_\_\_  
Signature of the declarant

Instructions: Documents which can be produced in support of the address are:

- (a) Ration card
- (b) Passport
- (c) Driving licence
- (d) Identity card issued by any institution
- (e) Copy of the electricity bill or telephone bill showing residential address
- (f) Any document or communication issued by any authority of the Central Government, State Government or local bodies showing residential address
- (g) Any other documentary evidence in support of this address given in the declaration

