

One unique way to become an HSBC Accredited Investor is to take the Sophisticated Investor Knowledge Test.

It's the ideal way for experienced investors to make the most of HSBC's bespoke Investment Service, which includes

- personalised service from our team of specialists,
- access to a comprehensive investment platform,
- with no platform, membership or administration fees – you only pay when you transact

The Sophisticated Investor Knowledge Test allows you to demonstrate your knowledge, expertise, and ability to assess risks. As an industry first, it has been developed to comply with the Corporations Act 2001 ("Corporations Act"). The purpose of the Accreditation is to qualify wholesale clients on the grounds that the investor has sufficient experience to assess the features of the offer, value of the product or service, and risks associated with holding the product

Before you take the test, to be eligible, you will need to have at least one million Australian Dollars in net assets and intend to invest more than one hundred and fifty thousand Australian Dollars with HSBC.

The test takes approximately 30 to 45 minutes to complete. If you don't have enough time to complete it in one session, your progress will be saved for up to 30 days, allowing you to return when convenient.

The Knowledge Test comprises of three key categories: product features, product performance and product risk. The test ensures that you have a wide range of product knowledge, which cover five key asset classes: Equities, Fixed Income, Managed Funds, Exchange Traded Funds, and Structured Products.

Each asset class section has six multiple choice questions. To pass, you will need to answer five out of the six questions in each section correctly and obtain a mark of at least 80% overall.

Customers who fail the Knowledge Test can reattempt the test again after two weeks.

To access the full benefits of this investment service, you will also need to register for HSBC Invest – your trading hub. It provides instant access to trade Shares, Bonds, ETFs, Managed Funds and more. It also shows cash flow visibility, so you have the information you need on-hand to execute your investment decisions quickly.

If you are a new customer, you will need to apply for HSBC Invest first. Once you're registered for HSBC Invest, you can then log on to HSBC Internet Banking to apply to become an Accredited Investor with HSBC.

Become an HSBC Accredited Investor and take control of your investments with a global leader in banking.

Contact our Investment Desk for more information on 1300 308 019 or speak to your Relationship Manager.