

# HSBC Personal Phonebanking Service



## HSBC Personal Banking Hotline 2233 3000 User Guide

Please select language **1** Cantonese **2** English **3** Putonghua

Tips : Press \* anytime to access the Help menu or \*\* to get back to the Main Menu.  
+ Press 1 to skip forward, 2 to go back.

^ Applicable to SmartVantage, Securities Account Holders only  
† Applicable to SmartVantage, UnitTrust Account Holders only

Quick Keys	Services
press <b>1</b> press <b>A/C No #</b> press <b>PIN</b> press <b>1</b>	<b>Bank Account &amp; Deposit Services</b> Express balance + 2 Account details 2 1 Balance enquiry + 2 2 Total relationship balance 2 3 Transaction records 2 3 1 Recent transaction records + 2 3 2 Remittance records 2 3 2 1 Inward remittance + 2 3 2 2 Outward remittance 2 3 3 Issued cheque status + 3 Transfers & bill payments 3 1 Transfer between your account & credit cards 3 2 Third-party transfer 3 3 Bill payments 3 4 Charity donation 4 Rates enquiry 4 1 Deposit rates 4 1 1 HKD time deposit 4 1 2 HKD savings deposit 4 1 3 Foreign currency time deposit 4 1 4 Foreign currency savings deposit 4 2 Exchange rates 4 3 Gold price 6 Other bank account related services 6 1 Stop cheque 6 2 Report lost card 6 3 Report lost passbook 6 4 Request cheque book 6 5 Request statement 6 5 1 Current month statement 6 5 2 Statement for other months 6 6 Other bank account related enquiries

press <b>2</b> press <b>A/C No #</b> press <b>PIN</b> press <b>1</b>	<b>Investment Services</b> Local securities services ^ 1 1 Order placement, amendment & cancellation 1 1 1 Buy stock 1 1 2 Sell stock 1 1 3 Place a Stop Loss Limit order 1 1 4 Place a Two Way Limit order 1 1 5 Place a Target Buy Sell order 1 1 6 Amend / cancel an order 1 2 Stock price & Hang Seng indices enquiries 1 2 1 Check stock prices + 1 2 2 Check the Hang Seng & sub-indices + 1 3 Order status enquiry 1 3 1 Check the status by transaction reference number 1 3 2 Check the status by stock code for orders placed today + 1 3 3 Review order of today + 1 4 My Selection + 1 4 2 Update your selection list 1 5 Corporate events enquiry 2 Overseas indices + ^ 3 UnitTrust services † 3 1 UnitTrust subscription, redemption & switching 3 2 Fund price enquiry + 3 3 Order status enquiry 3 3 1 Check the status by transaction reference number 3 3 2 Check the status by fund code for orders placed today + 3 3 3 Review order of the day + 3 4 My Selection + 3 4 2 Update your selection list 3 5 To obtain UnitTrust information by fax 3 5 1 For fund code & price sheet 3 5 2 Funds Navigator 3 5 4 Fund fact sheet 4 Bonds trading ^ 5 Portfolio value & statement request 5 1 Market value of all investment holdings 5 2 Market value of individual investment product 5 2 1 Local stock + 5 2 2 Local Warrants & Callable Bull Bear Contract + 5 2 3 UnitTrust & other investment products + 5 3 Request investment portfolio statement 6 Other investment enquiries 6 1 Enrol for order execution result via SMS 6 2 To obtain investment information by fax 6 3 Other investment enquiries
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Quick Keys	Services
press <b>3</b> press <b>A/C No #</b> press <b>PIN</b> press <b>1</b>	<b>Credit Cards Services</b> Report lost card 1 Card balance, payments & other account related services 1 1 Balance enquiry 1 2 Credit card payments & charity donation 1 2 1 Card payments 1 2 2 Charity donation 1 3 Change of payment instruction 1 3 1 Current month 1 3 2 Onward payments 1 4 Statement request 1 4 1 Current month statement 1 4 2 Previous month statement 1 4 3 Both months statements 1 4 4 For other months 1 5 Annual fee related enquiries 1 0 To talk to our customer service officer 2 Application status & application related information 2 1 Application status + 2 2 Application criteria & procedures 2 2 1 HSBC Premier card 2 2 2 Visa Platinum / green credit card 2 2 3 Gold credit card 2 2 4 Classic credit card 2 2 5 Renminbi credit card 2 2 6 Other cards 2 3 Application form 2 3 1 To obtain an application form by fax 2 3 0 To talk to our customer service officer 3 Reward points & related information 3 1 Reward points balance 3 2 Rewards summary & redemption form 3 0 To talk to our customer service officer 4 Card benefits & promotion programmes 4 2 Other marketing information 0 Other credit card enquiries through customer service officer

press <b>4</b> press <b>A/C No #</b> press <b>PIN</b> press <b>1</b>	<b>Insurance &amp; MPF Services</b> Medical & health insurance 1 1 Listen to commonly asked topics 1 2 To obtain forms & information by fax 1 3 For application & policy information 1 3 1 FirstCare & Outpatient Care 1 3 2 Other medical & health products 1 4 For claims 1 4 1 Claims procedures 1 4 2 Claims status 1 4 3 Claims adjustment & decline cases 1 4 4 Hospitality pre-assessment 1 4 5 Other claims related enquiries 2 Life insurance 2 1 Listen to commonly asked topics 2 2 To obtain forms & information by fax 2 3 For application & policy information 2 4 For claims 3 General insurance 3 1 Listen to commonly asked topics 3 2 To obtain forms & information by fax 3 3 For application & policy information 3 4 For claims 4 MPF
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press <b>5</b> press <b>A/C No #</b>	<b>Internet Banking, Phonebanking, ATM Service Enquiries &amp; Branch Locator</b> Internet banking 1 1 Security device 1 2 Internet banking registration procedures 1 3 Maintenance schedule 1 0 Other internet banking related enquiries 2 Phonebanking 2 1 Phonebanking user tips 2 2 Phonebanking user guide 2 3 Setup automatic account registration at phonebanking 2 4 Change your phonebanking PIN 2 5 Maintenance schedule 3 ATM & Self-Service banking 3 1 ATM, Cash Deposit Machine & Cheque Deposit Machine locator 3 1 1 ATM 3 1 2 Cash Deposit Machine 3 1 3 Cheque Deposit Machine 3 2 Request ATM PIN advice by mail 4 Branch locator 4 1 Search by location 4 2 Search by branch code 0 Other Internet banking, phonebanking, ATM & branch enquiries through customer service officer
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press <b>6</b>	<b>Report Lost Card</b>
press <b>7</b> press <b>A/C No #</b>	<b>Personal Loans, Mortgages &amp; Other Enquiries</b> Personal loans & mortgages 1 1 Personal loans enquiries 1 2 Mortgages enquiries 2 To obtain forms & documents by fax 0 Other enquiries through customer service officer

**Note:** If you are also a HSBC Premier customer or PowerVantage customer, you will be routed under the HSBC Premier Hotline (2233 3322) or HSBC PowerVantage Hotline (2748 8333) call menu after your identity is verified.

**General Notes relating to Investment Services:** 1. All information provided in relation to the provision of the Investment Services is for reference only. The Bank and the concerned Information Provider(s) endeavour to ensure the accuracy and reliability of such information provided, but do not guarantee its accuracy and accept no liability (whether in tort or contract or otherwise) for any loss or damage arising from any inaccuracies or omissions. 2. You can check order execution results through 'order status enquiry' by quoting the transaction reference number. You can also check the status by stock code for orders placed today. 3. You can place local securities orders (except for market orders) valid for up to 7 consecutive days, including the day on which the order is given, through Automated Phonebanking Services. 4. The Bank accepts a-bid limit order between 8:00 am to 9:45 am and between 4:00 pm to 4:08 pm on Hong Kong trading days. 5. The Bank accepts market orders between 10:00 am and 12:30 pm, and between 2:30 pm and 4:00 pm on Hong Kong trading days. Market order will be submitted to the market with one try only by matching it up to 5 best price queues and a maximum of 20 spreads from the prevailing nominal price at the time your order is processed. Any unfilled quantity will automatically be cancelled right away. 6. Please note that securities orders (limit orders and market orders) placed close to the closing time of the continuous trading session (4:00 pm) and a-bid limit order placed close to the closing time of the closing auction session (4:08 pm) may not be processed. You are advised to check order execution results through 'order status enquiry', as no personal calls will be given for confirmation of purchase/sale/amendment/cancellation orders. 7. Unit trust orders placed after 4:00 pm on Monday to Friday or on Saturday will be treated as the following trading day's orders. 8. Certain special charges and discounts otherwise available may not be available to customers placing orders through phonebanking service and the Bank accepts no liability in relation thereto.