



## Business Information Update Form Completion Guide





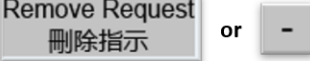




Limited companies, sole proprietorships and partnerships can use the **Business Information Update Form** to update the information that the Bank holds on:

- Your directors / partners
- The ultimate beneficial owners
- The registered name of your business or the business names of a branch
- Your authorised signatories and physical signing instructions
- The contact phone number, email address and contact person for the business.

Unless otherwise specified, requests made using this Form **apply only to the savings, current and investment accounts** of the customer whose details are set out in the 'Customer Information' section of this Form. The request(s) contained in this Form **does not apply to other account(s) and service(s)**, such as Trade accounts, MPF accounts, HSBCnet and Global Market products.

### Tips

	<p>Click this button to show important notes or to hide the notes after you have read them.</p>
	<p>If you select this button, <b>the examples of a change of physical signing instructions will not be printed.</b></p>
<div data-bbox="132 954 955 1101"> <p><b>Entity Information 公司資料</b></p> <p>Please select the entity type *</p> <p>請選擇公司類型</p> <p> <input type="checkbox"/> Limited Company 有限公司             <input type="checkbox"/> Sole Proprietorship 獨資經營商號             <input checked="" type="checkbox"/> Partnership 合夥人商號             <input type="checkbox"/> Changing from Sole Proprietorship to Partnership 公司類型由獨資經營商號更改為合夥人商號           </p> </div> <div data-bbox="132 1136 955 1331"> <p><b>Update Request and Account Selection 選擇更改指示及適用的戶口</b></p> <p>Please select the required instructions (You may choose more than one) 請選擇需要的指示(可選擇多於一項)</p> <p> <input type="checkbox"/> Change of Directors 更改董事             <input type="checkbox"/> Change of Ultimate Beneficial Owners Information 更改最終實益擁有人資料           </p> <p> <input type="checkbox"/> Change of Registered Name / Business Name of the Branch 更改註冊名稱 / 分行營業名稱             <input type="checkbox"/> Change of Authorised Signatories 更改授權簽署人           </p> <p> <input type="checkbox"/> Change of Contact Details of Customer / Contact Person of Customer 更改客戶聯絡資料 / 客戶聯絡人           </p> </div> <div data-bbox="132 1372 436 1502"> <p><b>Change of Directors 更改董事</b></p> <p>Director Type 董事種類 *</p> <p> <input type="checkbox"/> Individual 個人             <input type="checkbox"/> Corporate Entity 法人團體           </p> </div>	<p>Click to select the applicable choice(s). Where applicable, you may select as many categories as you need.</p> <p>Relevant instruction types will be displayed according to your selection.</p> <p>Sometimes you may need to make further choices.</p>

	Fields with a * <b>must be completed.</b>
	Hover the mouse over the '?' icon to <b>display a reminder.</b>
	As you add information to the Form, hints will be shown on how to enter the information correctly.
	Click these buttons to provide more than one request
	Click these buttons to delete the request as required
	Click this button to save your progress at any point and you can return to it later.
	Click this button when you finish your input for validation. <b>QR code(s) will be generated.</b>
	Click this button if you need to amend any information after validation. <b>When you finish, please click the 'Validate' button again.</b>
	Click this button to print the Form. Please also print all the QR code(s) and send to us with the Form. <b>Once you clicked this button, you will not be able to make any amendment on the form.</b>

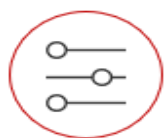
## 7 steps to completing the Form



[Read the important notes](#)



[Select your entity type](#)



[Select the section you need](#)



[Provide information](#)



[Revise the information](#)



[Validate and print](#)



[Sign and submit](#)



## Read the important notes

Please read through **all 10** important notes carefully. The notes tell you everything you need to know to complete the form.



## Select your entity type

After reading the important notes, you can then select your entity type. Relevant change requests will be displayed according to your selection.

Entity Information 公司資料

Please select the entity type \*  
請選擇公司類型

☐ Limited Company  
有限公司
 ☐ Sole Proprietorship  
獨資經營商號
 ☐ Partnership  
合夥人商號
 ☐ Changing from Sole Proprietorship to Partnership  
公司類型由獨資經營商號更改為合夥人商號

## Enter your business information

For all entity types, please enter the business information that is currently held by the Bank.

If you were originally a **Sole Proprietor** and have added new partner(s) to your entity, please select '**Changing from Sole Proprietorship to Partnership**', and you must also complete 'All Partners Information' section.

Customer Information 客戶資料 (the "Customer" 以下簡稱「客戶」)

Registered Name currently on Bank record  
銀行紀錄的註冊名稱  
English \*  
英文  
  
Chinese  
中文

Registration / Incorporation Document Type and Number \*  
登記 / 註冊文件種類及號碼  
☐ Hong Kong Certificate of Incorporation  
香港公司註冊證書  
☐ Business Registration Certificate  
商業登記證  
☐ Others, please specify document type  
其他, 請註明文件種類

Number \*  
號碼

All Partners Information 所有合夥人資料

Notes:  
1. To change the entity type from sole proprietorship to partnership, the original sole proprietor must be one of the partners of the Customer.  
2. If the existing account(s) has any credit facilities (such as business/corporate/ purchasing cards, overdraft facilities, lending, import/export facilities), trade account(s) and investment account(s), you will need to cancel the credit facilities before your request can be processed. For any queries, please contact us at 2748 8288 (select: Update Business Information) or your Relationship Manager.  
3. Please provide information for ALL general partners in the table below. Information for limited partners are not required.  
4. Please submit also the Business Registration Regulations Form 1(a) / (c) and Amendment History.

Type of Partner 合夥人的種類  
☐ Individual  
個人  
☐ Corporate Entity  
法人團體



## Select the sections you need

**Update Request and Account Selection 選擇更改指示及適用的戶口**

Please select the required instructions (You may choose more than one) 請選擇需要的指示(可選擇多於一項)

☐ Change of Directors 更改董事

☐ Change of Ultimate Beneficial Owners Information 更改最終實益擁有人資料

☐ Change of Registered Name / Business Name of the Branch 更改註冊名稱 / 分行營業名稱

☐ Change of Authorised Signatories 更改授權簽署人

☐ Change of Contact Details of Customer / Contact Person of Customer 更改客戶聯絡資料 / 客戶聯絡人

You can select **as many requests as you need**.  
Your selected sections will be displayed for you to complete.

For some sections, you will need to make further choices, such as 'Change of Directors', 'Change of Partners', 'Change of Registered Name / Business Name of the Branch' sections etc.

**Change of Directors 更改董事**

Director Type 董事種類 \*

☐ Individual 個人

☐ Corporate Entity 法人團體

**Change of Partners 更改合夥人**

Notes:

1. Instruction to change all partners is not accepted. In such a case, please arrange to open a new account.
2. If the existing account(s) has any credit facilities (such as business/corporate purchasing cards, overdraft facilities, lending, import/export facilities), trade account(s) and investment account(s), you will need to cancel the credit facilities before your request can be processed. For any queries, please contact us at 2748 8288 (select: Update Business Information) or your Relationship Manager.
3. Please provide information for general partners in the table below. Information for limited partners are not required.
4. Please submit also the Business Registration Regulations Form 1(a) / (c) and Amendment History.

Type of Partner 合夥人的種類

☐ Individual 個人

☐ Corporate Entity 法人團體

**Change of Registered Name / Business Name of the Branch 更改註冊名稱 / 分行營業名稱**

Notes:

1. Change of name request for client account, funding account such as Quality Education Fund, government special project cannot be accepted.
2. The change of name will apply, where applicable, to the company's savings account(s), current account(s), investment account(s), trade account(s), business/corporate/purchasing card(s), Business Internet Banking, autopay service.
3. Please also submit the Certificate of Change of Name/ Certificate of Change of Name issued by the Registrar of Companies HK (or equivalent) AND / OR Business Registration Certificate.
4. We may request you to provide further details and documents where necessary.

☐ A. Registered Name 註冊名稱

☐ B. Business Name of the Branch 分行營業名稱

Please select the appropriate type accordingly.

**Change of Authorised Signatories 更改授權簽署人**

Note: Applicable account(s) maintained by the Customer with the same Registration Incorporation Document Number as set out in the "Customer Information" section above. 注意: 適用於「客戶資料」部分所述的同一登記/註冊文件號碼的客戶所開立的戶口。

**Account Applicability 更改指示適用的戶口**

☒ All saving, current and investment account(s) 所有儲蓄, 往來及投資戶口

☐ Specific account(s) 指定戶口

Please select the required instructions (You may choose more than one) 請選擇需要的指示 (可選擇多於一項)

☐ A. Removal of Authorised Signatory 離任授權簽署人

☐ B. Appointment of Authorised Signatory 委任授權簽署人

☐ C. Business Internet Banking Service 商務「網上理財」服務

☐ D. Change of Physical Signing Instruction 更改實體簽署指示

If you want to give your new authorised signatories **access to Business Internet Banking**, please select **option C**.

If you want to **change the physical signing instructions**, please select **option D**.



## Provide the information

### a. Signature authentication

To appoint a **NEW Director and/or Authorised Signatory**, please provide his/her specimen signatures. **The specimen signatures must be authenticated by an eligible certifier.**

#### Change of Director

<b>Individual</b> 個人 <input checked="" type="checkbox"/> Appointment 委任 <input type="checkbox"/> Resignation 離任 <input checked="" type="checkbox"/> Mr. 先生 <input type="checkbox"/> Mrs. 太太 <input type="checkbox"/> Miss 小姐 <input type="checkbox"/> Ms. 女士		Identification Document Type and Number * 身分證明文件種類及號碼 <input checked="" type="checkbox"/> HK Identity Card 香港身分證 Permanent * 永久 <input checked="" type="checkbox"/> Yes 是 <input type="checkbox"/> No 否 <input type="checkbox"/> Passport 護照 <input type="checkbox"/> Others, please specify document type 其他, 請註明文件種類	
Full Name (English) * 全名 (英文) Chan Tai Man		Full Name (Chinese) 全名 (中文)	
Number * 號碼 A123456(7)			

This part must be signed by the newly added director, please also send us the copy of his/her identity document.  
 此部分必需由新董事簽署, 並請同時遞交他 / 她的身分證明文件副本。

Signature 簽署

I hereby provide my signature below and agree to its serving as my specimen signature for the Director of the Customer stated in the "Customer Information" section of this Form.  
 本人特此簽署以作本人同意以此作為「客戶資料」部分所述客戶的董事的簽字式樣紀錄。

X

S.V.

#### Change of Authorised Signatories

<b>B. Appointment of Authorised Signatory (Individual)</b> 委任授權簽署人 (個人) Notes: If the appointed Authorised Signatory will become the Business Internet Banking Primary User, Part C must be completed. If physical signing instructions have to be changed, Part D must be completed. 注意: 如委任的授權簽署人將成為商務「網上理財」主要使用者, 必須填寫C部。如需更改實體簽署指示, 必須填寫D部。	
<input checked="" type="checkbox"/> Mr. 先生 <input type="checkbox"/> Mrs. 太太 <input type="checkbox"/> Miss 小姐 <input type="checkbox"/> Ms. 女士	
Full Name (English) * 全名 (英文) Chan Tai Man	
Full Name (Chinese) 全名 (中文)	
Number * 號碼 A123456(7)	

This must be signed by the newly added authorised signatory, please also send us the copy of his/her identity document.  
 此部份必需由新授權簽署人簽署, 並請同時遞交他 / 她的身分證明文件副本。

Signature 簽署

I hereby provide my signature below and agree to its serving as my specimen signature for the business account(s) stated in the "Change of Authorised Signatories" section of this Form.  
 本人特此簽署以作本人同意以此作為此表格「更改授權簽署人」部分所述公司在貴行的戶口的簽字式樣紀錄。

X

S.V.

Job Title 職銜: Director  
 Signing Group (if applicable) 簽署組別 (如適用):

## b. Particular information will supersede ALL existing records

In 'Change of Ultimate Beneficial Owners Information', and 'Change of Contact Details of Customer / Contact Person of Customer' sections, the provided information **will supersede ALL existing records** that hold in the Bank. Please ensure you have provided all instruction in the section.

### Change of Ultimate Beneficial Owners Information

#### Change of Ultimate Beneficial Owners Information 更改最終實益擁有人資料

Note: The information provided below will supersede the existing record maintained with the Bank. Please provide information of ALL shareholders/beneficial owners who own more than 10% issued share capital of the Company in the table below.

注意：此部份提供的資料將取代本行中的現有記錄。請在以下表格列明所有持有多於10%公司已發行股本的股東 / 實益擁有人資料。

#### Ultimate Beneficial Owner Information 最終實益擁有人資料

☐ Mr. 先生    ☐ Mrs. 太太    ☐ Miss 小姐    ☐ Ms. 女士

Full Name (English) \* 全名 (英文)

Full Name (Chinese) 全名 (中文)

Date of Birth (DD/MM/YYYY) \* 出生日期 (日 / 月 / 年)

Ownership (%) \* 所持股份 (%)    Voting Right (%) 投票權 (%)    Residential Address \* 住宅地址

Please also send us the copy of the identity document of all newly added beneficial owner(s). 請同時遞交所有新實益擁有人之身分證明文件副本。

#### Identification Document Type and Number \* 身分證明文件種類及號碼

☐ HK Identity Card 香港身分證  
☐ Passport 護照  
☐ Others, please specify document type 其他, 請註明文件種類

Number \* 號碼

Nationality (Country/Region) \* 國籍 (國家 / 地區)

### Change of Contact Details of Customer / Contact Person of Customer

#### A. New Business Telephone Number or New Business Email Address of the Customer 客戶新商業電話號碼或商業電郵地址

Note: The contact details of the Customer listed below will supersede all existing contact details of the Customer on record. 注意：以下填寫的聯絡資料將取代客戶現有的所有聯絡資料紀錄。

New Business Telephone Number of the Customer 客戶新商業電話號碼

Country / Region Code - Area Code (if any) and Number 國家 / 區域編號 - 地區編號(如有)及號碼

New Business Email Address of the Customer 客戶新商業電郵地址

#### B. Contact Person(s) of the Customer 客戶聯絡人

Notes: 1. Contact person(s) refers to any person nominated by the Customer to receive, on behalf of the Customer, banking information and direct marketing information and materials from the Bank. Each contact person agrees to be contacted by the Bank and to receive banking information and direct marketing information and materials from the Bank via the telephone number and email address provided below. 2. Please provide details of ALL contact person(s) of the Customer below, maximum 3 contact persons are accepted. The contact person(s) listed below will supersede all existing contact person(s) on record.

注意：1. 聯絡人指獲提名代客戶接收銀行資訊及直接促銷資訊和資料的任何人士。聯絡人均同意本行透過以下提供的電話號碼和電郵地址作聯絡用途，並接收銀行資訊及直接促銷資訊和資料。2. 請於下方提供客戶所有的聯絡人資料，上限為三位。以下填寫的聯絡人資料將取代客戶現有的所有聯絡人的紀錄。

#### Contact Person(s) 聯絡人

☐ Mr. 先生    ☐ Mrs. 太太    ☐ Miss 小姐    ☐ Ms. 女士

Full Name (English) \* 全名 (英文)

Job Title \* 職銜

Full Name (Chinese) 全名 (中文)

Email Address \* 電郵地址

Telephone Number \* 電話號碼

Country / Region Code - Area Code (if any) and Number 國家 / 區域編號 - 地區編號(如有)及號碼

### c. Important Notes on 'Change of Physical Signing Instruction'

Like the above, the signing instructions set out in the '**Change of Physical Signing Instruction**' under 'Change of Authorised Signatories' **will supersede ALL existing records** applicable to the selected account(s) that are held in the Bank.

**Here is an example:**

If your account originally has 2 signing instructions and need to ADD a new instruction, you need to **set out all signing instructions applicable** to the selected account(s) in this part.

**Customer's Physical Signing Rules 客戶的實體簽署規則**

Any one authorised signatory (existing and/or newly appointed in part B) to sign  
☐ 其中一位授權簽署人 (現行或在此部分B節所新增) 簽署

Any two authorised signatories (existing and/or newly appointed in part B) to sign  
☐ 其中兩位授權簽署人 (現行或在此部分B節所新增) 簽署

Customised physical signing rules, please specify below.  
 請於下方說明自定實體簽署規則

Transaction Amount 交易金額	Signing Rule 簽署規則	
Any transaction amount 任何金額	1A+1B+2C Existing	+
Transaction amount up to 交易金額上限 Currency 貨幣: HKD 港幣 Amount 金額: 100,000	1A+1B Existing	-
Transaction amount up to 交易金額上限 Currency 貨幣: HKD 港幣 Amount 金額: 200,000	1A+2B New	-

*(If you want to find out the existing signing instructions, Primary User(s) of eligible customers can view the existing physical signing instructions by logging on to Business Internet Banking and going to 'Account' > 'Business Information'.)*



### Revise the information

If any of the information you provide doesn't match the requirements shown, you will see tips to help you correct it. Please follow these tips to revise the information, where appropriate.

Warning: JavaScript Window -

 Mandatory field, please enter a valid 16-digit card number 此欄必須填寫, 請輸入有效的16位數字卡號碼

OK



## Validate and print

FW: It must be approved by the appropriate authoriser as per the "AMH CMB Product Pricing Handling Procedure"

(Branch / Department Chop, Name and Authorised Signature)

Save 儲存 Validate 核實

Please click '**Validate**' after you have finished entering the information.

You will see an error message **if any information is missing**. Please check that all the mandatory information has been provided and then click 'Validate' again.

Warning: JavaScript Window -

Please input all mandatory fields highlighted in red 請填寫所有紅色標示的部分

OK

When the form is **successfully validated, QR codes will be generated** at the end of the Form.

Warning: JavaScript Window - Message

Successfully validated. 成功核實

OK



FW: It must be approved by the appropriate authoriser as per the "AMH CMB Product Pricing Handling Procedure"

(Branch / Department Chop, Name and Authorised Signature)

Save 儲存 Amend 更改 Print 列印

It is important that you make sure the information provided in the form is correct before clicking 'Print'. Once you click the 'Print' button, **the information can no longer be changed**.

Highly recommend you save the validated form.

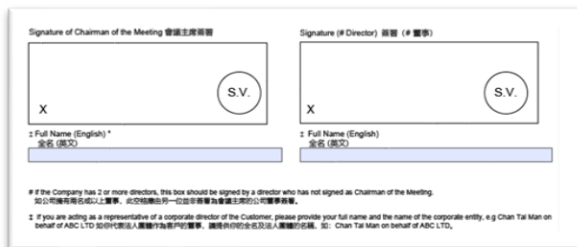
After validation, 'Amend' and 'Print' button will become available. You can then either click the '**Print**' button to print the form OR click the '**Amend**' button to make change before printing out the form if required.





## Sign and submit

### Limited Company



Signature of Chairman of the Meeting 會議主席簽署

Signature (if Director) 簽署 (if 董事)

1 Full Name (English) \* 全名 (英文)

2 Full Name (English) \* 全名 (英文)

3 Full Name (English) \* 全名 (英文)

4 Full Name (English) \* 全名 (英文)

5 Full Name (English) \* 全名 (英文)

6 Full Name (English) \* 全名 (英文)

7 Full Name (English) \* 全名 (英文)

8 Full Name (English) \* 全名 (英文)

9 Full Name (English) \* 全名 (英文)

10 Full Name (English) \* 全名 (英文)

11 Full Name (English) \* 全名 (英文)

12 Full Name (English) \* 全名 (英文)

13 Full Name (English) \* 全名 (英文)

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87 Full Name (English) \* 全名 (英文)

88 Full Name (English) \* 全名 (英文)

89 Full Name (English) \* 全名 (英文)

90 Full Name (English) \* 全名 (英文)

91 Full Name (English) \* 全名 (英文)

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98 Full Name (English) \* 全名 (英文)

99 Full Name (English) \* 全名 (英文)

100 Full Name (English) \* 全名 (英文)

### Sole Proprietorship



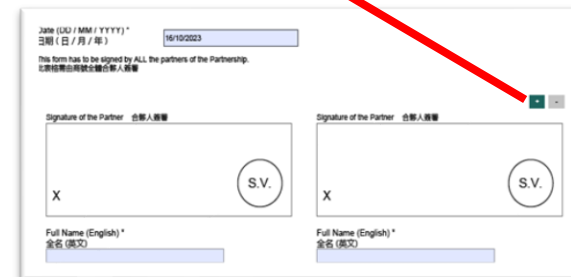
Date (DD / MM / YYYY) \* 日期 (日 / 月 / 年)

16/10/2023

Signature of the Sole Proprietor 獨家經營者簽署

Full Name (English) \* 全名 (英文)

### Partnership



Date (DD / MM / YYYY) \* 日期 (日 / 月 / 年)

16/10/2023

This form has to be signed by ALL the partners of the Partnership. 此表格需由所有合夥人簽署。

Signature of the Partner 合夥人簽署

Signature of the Partner 合夥人簽署

Full Name (English) \* 全名 (英文)

Full Name (English) \* 全名 (英文)

For partnership, you can click the '+' or '-' icon to add or delete the signature boxes as required before validation.

Please provide the signature of the director(s) / sole proprietor / all partners **as instructed**.

### Before you submit the Form:

1. Please make sure that your new director(s) and/or new authorised signatory(ies) have provided their specimen signature in relevant sections. Make sure you have read the important notes for the 'Declaration and Certificate of Due Authorisation' section for limited company or 'Declaration and Mandate' section for sole proprietorship and partnership.
2. Please print out and submit all the QR codes generated with the form to the Bank.
3. Make sure you are ready to submit all the documents required to support your Business Information Update request. To find out which documents you need, please visit the Business Information Update Section of our public website: <https://www.business.hsbc.com.hk/en-gb/business-information-update>.