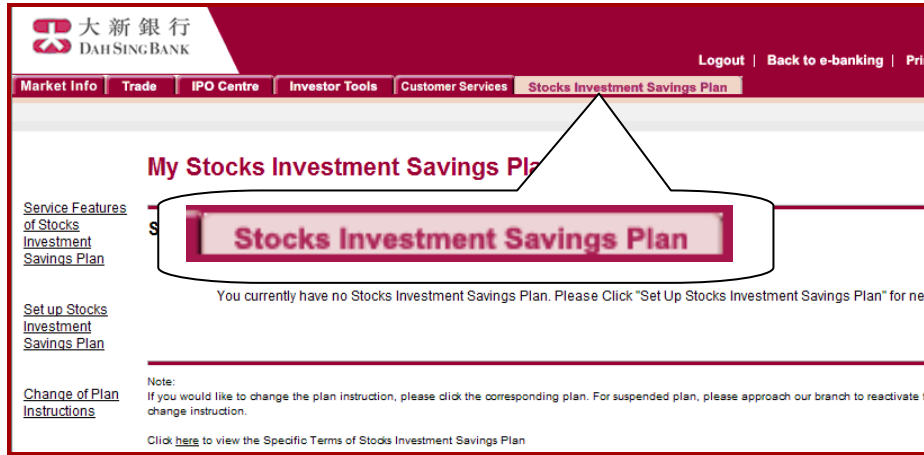


## i-Securities Services Guide – Stock Investment Saving Plan

Log on “Stocks Investment Savings Plan”



1. Log on i-Securities service
2. Log on “Stock Investment Savings Plan”. You may view the registered Stock Investment Saving Plan, setup or change plan

## Set up Stocks Investment Savings Plan

### Set up Stocks Investment Savings Plan - Specific Terms

[Service Features of Stocks Investment Savings Plan](#)

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The following specific terms governing the use of Stocks Investment Savings Plan services provided by the Bank are set out below. Please read these terms carefully before setting up the Stocks Investment Savings Plan.

**Set up Stocks Investment Savings Plan**

1.1 The words and expressions shall have the meaning ascribed to them by the Bank.

“Debit Account” means, in respect of each participation of the Customer in the Plan, such account with the Bank as may be specified by the Customer and acceptable to the Bank from time to time.

1. Select “Set up Stocks Investment Savings Plan”
2. Read the related terms and disclosure.
3. Click “Confirm” at the bottom of the page



### Set up Stocks Investment Savings Plan

[Service Features of Stocks Investment Savings Plan](#)

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[Change of Plan Instructions](#)

Plan Name : 00388 HONG KONG EXCHANGES AND CLEARING LTD

Securities Account Number :

Monthly Investment Amount : HKD 8000

Debit Account : Settlement A/C -

First Hold Fund Date : 10 Sep 2012

- The minimum monthly investment amount is HKD1,000. You can increase your monthly contribution in multiples of HKD500. The amount includes the brokerage and other charges.
- If you use credit card as Debit Account, the aggregate total of monthly investment amount of all your Plans cannot be greater than HKD5,000.

**Continue**

1. Select stock plan and monthly investment amount
  2. Select debit account (may choose either settlement A/C or credit card\*)
  3. Click “Continue”
- \*If you choose credit card as debit account, the total monthly investment amount under your name should not exceed HKD5,000



### Set up Stocks Investment Savings Plan

Please Confirm ...

[Service Features of Stocks Investment Savings Plan](#)

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[Change of Plan Instructions](#)

Plan Name : 00388 HONG KONG EXCHANGES AND CLEARING LTD

Securities Account Number :

Monthly Investment Amount : HKD 8,000

Debit Account : Settlement A/C -

Monthly Hold Fund Date : 9th of each month

First Hold Fund Date : 10 Sep 2012

- The monthly investment amount will be held in your Debit Account on the pre-designated monthly Hold Fund Date.
- If the Hold Fund Date falls on a non-business day, including Saturday, Sunday or public holidays, the monthly investment amount will be held in your Debit Account on the next business day. The purchase instruction will be executed 2 business days after the Hold Fund Date.

**Cancel** **Confirm**

1. Check the plan details
2. Click “Confirm”



**My Stocks Investment Savings Plan**

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[Service Features of Stocks Investment Savings Plan](#)

**Securities Account Number :**

Plan Name	Monthly Investment Amount	Hold Fund Date
00388 HONG KONG EXCHANGES AND CLEARING LTD	HKD 8,000	9th of each month

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[Set up Stocks Investment Savings Plan](#)

[Change of Plan Instructions](#)

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Change of Plan Instructions

tion, please click the corresponding plan. For suspended plan, please approach our branch to reactiva

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Registration is finished. You may click “Chang of Plan Instructions” to view registered plans.

## Change Stocks Investment Savings Plan

**My Stocks Investment Savings Plan**

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**Securities Account Number :**

Plan Name	Monthly Investment Amount	Hold Fund Date
00388 HONG KONG EXCHANGES AND CLEARING LTD	HKD 8,000	9th of each month

Note: If you would like to change instruction, please click the corresponding plan. For suspended plan, please approach our branch to reactivate.

Click here to view [Change of Plan Instructions](#) for Investment Savings Plan

1. Click “Change of Plan Instructions”
2. Select the stocks investment savings plan to be changed



**Change of Plan Instructions**

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[Change of Plan Instructions](#)

**Current Instruction**

Plan Name : 00388 HONG KONG EXCHANGES AND CLEARING LTD  
Securities Account Number :  
Monthly Investment Amount : HKD 8,000  
Debit Account :

**New Instruction**

Monthly Investment Amount : HKD 8500  
Debit Account : Settlement A/C -

- The minimum monthly investment amount is HKD1,000. You can increase your monthly contribution in multiples of HKD500. The month include the brokerage and other charges.
- If you use credit card as Debit Account, the aggregate total of monthly investment amount of all your Plans cannot be greater than HKD50,000.

[Back](#) [Continue](#)

1. Input the new monthly investment amount and / or debit account
  2. Click “Continue”
- \*If you would like to cancel the plan, pls reach our branches.



**Change of Plan Instructions**

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[Change of Plan Instructions](#)

**Please confirm ...**

Plan Name : 00388 HONG KONG EXCHANGES AND CLEARING LTD  
Securities Account Number :  
Monthly Investment Amount : HKD 8,500  
Debit Account : Settlement A/C -  
Effective Date : Sep 2012

[Cancel](#) [Confirm](#)

1. Check the plan details
2. Click “Confirm”



<b>Change of Plan Instructions</b>	
<a href="#">Service Features of Stocks Investment Savings Plan</a>	<b>Thank you. Your request has been received.</b>
<a href="#">Set up Stocks Investment Savings Plan</a>	Reference Number : 397 Plan Name : 00388 HONG KONG EXCHANGES AND CLEARING LTD Securities Account Number : Monthly Investment Amount : HKD 8,500 Debit Account : Settlement A/C - Effective Date : Sep 2012
<a href="#">Change of Plan Instructions</a>	

The change is finished. You may click “Chang of Plan Instructions” to view registered plans.