Frequently Asked Questions (FAQs)

1. What is the Funds Transfer Smart Form?

The Funds Transfer Smart Form is the new form used to request for Funds Transfer through branches.

It is in the format of a Dynamic PDF that enables customers to provide their payment instruction in an easy-to-use, electronic format. The Smart Form is a globally-consistent payment form that incorporates drop-down options and logic to enhance the way you fill-out the form and the way the bank captures your funds transfer information.

2. Why is there a Smart Form?

By moving to the smart form, HSBC makes it easier for you to fill in the necessary information and ensure that you do not miss out anything. The new form will allow us to process your request faster and ensure the accuracy of data.

3. Why was the Smart Form updated?

Updates were introduced and may continue to be introduced once in awhile to ensure that customer concerns are addressed as they arise, and to ensure that the form remains compliant to regulatory or policy requirements.

We encourage you to always visit HSBC's website to ensure that you use the latest version of the Smart Form.

4. Where can I get the new form?

• Visit www.hsbc.com.ph
• Click the Personal Tab
• Click Forms and Documents
• Scroll down to Transfers and Payments: Funds Transfer
• Choose the appropriate option between HSBC Philippines and HSBC Savings Bank

5. Is there a guide on how fields should be filled-up?

The form, when opened, will come with detailed instructions to help guide you on how you should fill up the form.

6. What's the difference between a white input field and a highlighted (light blue) field?

Only the highlighted fields need to be filled up. The white fields do not have to be filled up and/or will be filled up automatically.

7. What are the different funds transfer options?

RTGS (Real-Time Gross Settlement) - Domestic PHP transfer to another bank in the Philippines
GSRT (Gross Settlement Real-Time) - Domestic USD transfer to another bank in the Philippines
LP (Local Payment) - Domestic PHP or USD transfer to another bank in the Philippines via the Philippine Clearing House Corporation
Telegraphic Transfer - International/Cross border transfer to another bank outside the Philippines

8. What if I want to just print the form and provide my hand-written information to the branch; can this be accommodated?

You will not be able to print the smart form with incomplete information.

9. What happens if I have accomplished the form and submitted it to the branch only to find out there are some corrections. Can I re-submit the same form bearing my corrections?

No, you cannot re-submit the same form bearing your corrections. You have to accomplish a new form with the correct information.

10. Can I save a my filled-in form?

Yes, you can click the 'Save' button found at the top-right portion of the form if you are using your own personal computer in preparing the form. However, we recommend to use the link found in HSBC's website every time you apply for a funds transfer to ensure that you are using the latest version of the form.

11. I already prepared the form. Can someone submit it for me?

Yes, but please make sure that your form is accomplished electronically and signed before sending it through an authorized representative.

12. How else can I request for Funds Transfer if not through the branches?

You may enroll to HSBC online banking. This is actually a more seamless way of requesting for funds transfer. To start your enrollment, please click here

All you have to do is follow the instructions and provide the required information.

13. What are the systems requirements for using the Smart Form?

Reader
Adobe Acrobat Reader Version 8.0 or above must be installed in your computer to be able to launch the SmartForm. Visit www.adobe.com for a FREE UPGRADE, if required.

If the Internet Browser Plug-in does not support the Smart Form, you can download the form to your computer and open it using Adobe Acrobat Reader software.

Note: The built-in Adobe Acrobat PDF viewer included in MOZILLA FIREFOX and GOOGLE CHROME BROWSERS DO NOT SUPPORT XFA-based PDF Smart Forms. If you wish to use the said browsers to open the Smart Form, please visit helpx.adobe.com/livecycle/kb/xfa-forms-firefox-chrome.html for a guide from Adobe on how to be able to do so.

Printer
Customers are recommended to use a laser printer with at least 600 dots per inch (dpi) Resolution (A4 Actual Size) to print the Smart Form.