BOCHK FamilyMAX "Legacy of Love" Scheme – Customer Registration Form [*] [#]

Bank of China (Hong Kong) ("BOCHK") *Private Wealth / Wealth Management* customers ("Eligible Parent Customers") may register a family relationship with their children (aged 18 or above) holding any savings account with BOCHK ("Child Customers"), or enroll non-BOCHK customer children into the new "Legacy of Love" scheme.

Eligible Parent Customers must complete this form and return it to any BOCHK branch.

For completion by Eligible Parent Customer

Name (Please complete in English): _____

HKID Number: _____

Daytime Contact Number: _____

Child's Details:

Name (Please complete in English): _____

HKID Number: _____

□ Also refer the child to newly join or upgrade to the same integrated banking services - *Private Wealth / Wealth Management*. The Child Customer may enjoy a 1-year complimentary trial of *Private Wealth / Wealth Management* services.
If the child is not a BOCHK customer, please provide daytime contact number:
_____

The collection of the above personal data is voluntary. Both the Eligible Parent Customer and the Child Customer may decide at their own discretion whether to provide the information. BOCHK is the data user for the information collected under this scheme and will use the data solely for the purposes of this scheme.

□ The Eligible Parent Customer and Child Customer consent to provide the above information for the purposes of this scheme and confirm that the Child Customer has agreed to the use of such information by BOCHK for this scheme. The Eligible Parent Customer also confirms that the information provided is accurate and correct. Furthermore, both parties confirm and agree that BOCHK has the right to verify the information provided, and they shall bear responsibility for any consequences arising from the use of incorrect, misleading information or improper collection methods.

□ The Eligible Parent Customer and Child Customer confirm that they have read, understood, and agree to be bound by the terms and conditions[#] of this scheme.

_____	_____	_____
Signature of Eligible Parent Customer (S.V.)	Signature of Child Customer (S.V.)	Date

For Bank's Use Only Parent Customer CIN: _____ Parent is: □ *Private Wealth* □ *Wealth Management* Child Customer CIN: _____ **For *Private Wealth / Wealth Management* Upgrade Only** Child is: □ New Account □ Account Upgrade Child enrolls / upgrades to □ *Private Wealth* □ *Wealth Management*. Service Upgrade Date: _____ Branch Code: _____ Staff Name: _____

 # Please refer to the Terms and Conditions.

** Both original and photocopy of this form are valid.*

Terms and Conditions of "Legacy of Love" Scheme

a. This scheme shall be applicable to *Private Wealth* or *Wealth Management* customers of Bank of China (Hong Kong) Limited ("BOCHK") ("Eligible Parent Customer"), who register a family relationship during the promotional period for their child ("Child Customer") who is 18 years old or above and hold any savings account with BOCHK or refer the non-BOCHK customer to join the "Legacy of Love".

b. Eligible Parent Customer must complete and sign the designated registration form to participate in this scheme.

c. Child Customer who successfully upgrade or newly sign up the *Private Wealth* or *Wealth Management* service will be entitled to enjoy the same customer tier as their Eligible Parent Customer—i.e., access to *Private Wealth* or *Wealth Management* services—from the effective date until the last day of the same calendar month in the following year (the "Experience Period"). For example, if a Child Customer opens sign up the service on January 15, 2026, the service Experience Period will last until January 31, 2027.

d. **Upon completion of the Experience Period, Child Customer must maintain a minimum Total Relationship Balance of HKD 8 million (for *Private Wealth* client) or HKD 1 million (for *Wealth Management* client) in order to retain their respective customer tier status and continue enjoying premium benefits, services, and product offerings. If the Total Relationship Balance falls below the required threshold, the Bank reserves the right to withdraw the *Private Wealth* or *Wealth Management* status and reassign the client to an appropriate customer tier without prior notice.**

e. The name and telephone number provided by the Child Customer to BOCHK staff upon participation in this scheme are solely for the purpose of communication related to this promotion. Such contact information will be deleted within one month of collection.

f. BOCHK reserves the right to change, suspend or terminate the above promotion and to amend the relevant terms and conditions at any time at its sole discretion.

g. The scheme will be based on the records of BOCHK. In case of any discrepancy between customer-held information and the bank's records, the bank's records shall prevail.

h. In case of any dispute, the decision of BOCHK shall be final.

i. Should there be any discrepancy between the English and Chinese versions of this promotion material, the Chinese version shall prevail.

Definition of "Total Relationship Balance":

a. Includes the monthly value of the following items under the customer's name: (i) The average amount of the total day-end balance of the deposit balance in the savings and current accounts, the principal amount of time deposits, contributed amounts of the Club Deposits, value of the investment assets[1] (including Securities[2], Securities Margin, Bonds, Certificate of Deposit, Funds, Structured Notes, Equity Linked Investments, Currency Linked Investment, Structured Investment, Investment Deposit, Precious Metal / FX Margin, Precious Metals), utilized overdraft balance under the current accounts, life insurance plan[3], outstanding balance of other loans[4] and the vested balance of the Mandatory Provident Funds ("MPFs")[5] ; and (ii) Mortgage payments[6] , outstanding

balance and un-post installment balance under the BOC Credit Card[7] and the "Total Relationship Balance" of the Master Customer of "Business Integrated Account"[8].

b. The "Total Relationship Balance" under the customer's name includes the "Total Relationship Balance" of all his/her sole-name and joint-name accounts. Actual monthly calculation period starts from the last business day of the previous month to the day before last business day of the prevailing month.
c. All foreign currency balances are calculated based on exchange rates quoted by the Bank from time to time.
d. The relevant calculation results shall be subject to the Bank's records.

Note 1: The Bank calculates the daily market value according to the features of investment products. Unsettled bought quantities of the stock are excluded while securities collateral is included.

Note 2: Local listed securities (including securities settled in Hong Kong Dollar and non-Hong Kong Dollar), A shares, US securities, specified Singapore listed securities (The value of the specified Singapore listed securities would be calculated on the basis of the closing price at the end of the previous month).

Note 3: Only apply to in force life insurance plans distributed by the Bank as an insurance agent with details as follows: (i) Investment-linked life insurance plans and "HKMC Annuity Plan" underwritten by HKMC Annuity Limited are calculated based on the Policy Value of the policies; Other life insurance policies are calculated based on the Policy Value or Accumulated Net Premium Paid for the policies, whichever is higher; (ii) The Bank reserves the right to update the scope of in force life insurance plans from time to time, without prior notice to customers.

Note 4: Other loans refer to the loan products provided by BOC Credit Card (International) Limited ("Card Company") or the Bank excluding the overdraft under the current accounts, mortgage loans and the payments and un-post installment balance under the BOC Credit Cards.

Note 5: Only apply to the MPFs with BOCI-Prudential Trustee Limited as the Trustee.

Note 6: (i) Excludes any prepayment amount; (ii) For the "All-You-Want" Mortgage Scheme, the next monthly minimum payment will be counted; (iii) For the Reverse Mortgage Scheme, the monthly payout amount is counted, except the first monthly payout amount.

Note 7: BOC Credit Cards refer to the credit cards issued by Card Company.

Note 8: Only apply to the sole proprietorships owned by the personal customers (for sole-name account only) who maintain Private Wealth / Wealth Management service with the Bank. Such sole proprietorship holds the "Business Integrated Account" with the Bank and the customer has registered with the Bank to add the "Total Relationship Balance" of the Master Customers to his/her individual "Total Relationship Balance". For the details of "Total Relationship Balance" of "Business Integrated Account", please refer to the relevant product leaflets and terms for the services.