

## BESTINVEST AUTUMN 2023 TRANSFER CASHBACK OFFER TERMS AND CONDITIONS

### GENERAL

We are Evelyn Partners Investment Management Services Limited trading as "Bestinvest" or "Bestinvest by Evelyn Partners" registered in England and Wales at 45 Gresham Street, London EC2V 7BG, company no. 02830297, authorised and regulated by the Financial Conduct Authority. In these terms and conditions ("T&C") we are referred to as "we", "our" or "Bestinvest".

These T&C govern our Autumn 2023 Transfer Cashback Offer ("Offer").

These T&C are supplemental to the Bestinvest Terms and Conditions as applicable. Words defined in such terms and conditions shall have the same meaning in these T&C.

Payment of cashback is not automatic. You need to take steps to claim your reward (see below).

This Offer: cannot be used in conjunction with any other Bestinvest offer or promotion.

### AUTUMN 2023 TRANSFER CASHBACK OFFER REQUIREMENTS

Any new Bestinvest customer or existing client who initiates account transfers in full between 4 September 2023 and 30 November 2023 and invests it, is eligible for a cashback payment ("Reward").

This offer is for account transfers from other financial services providers, not for cash payments made from bank accounts or transfers between Bestinvest accounts. The account types that can be transferred from other providers are ISAs, Junior ISAs, Investment accounts and SIPPs.

The "Value Transferred and Invested" means:

- a) an amount of one thousand pounds (£1,000) or more, as set out in the table below;
- b) that is transferred into one account, with the transfer initiated between 4 September 2023 and 30 November 2023; and
- c) that is invested on receipt and continuously held in that account from 30 November 2023 to 31 May 2024.

The offer is for values transferred in specie or in cash and invested, not values transferred and left in cash. The Value Transferred and Invested and corresponding Reward are set out in the following table:

Value Transferred and Invested	Reward
Less than £1,000	Not eligible for Reward
£1,000 to £19,999.99	£100
£20,000 to £49,999.99	£300
£50,000 to £99,999.99	£600
£100,000 or greater	£1,000

The Offer applies on a per client basis, not a per account basis.

The relevant figure is the Value Transferred and Invested. The performance of investments within the transferred account (once it becomes a Bestinvest account) are not taken into consideration, nor are additional contributions made to the account after it has been transferred to Bestinvest.

The Offer is made on a fair-usage basis. The purpose of the Offer is to incentivise customers to transfer existing accounts held with other providers. Bestinvest may refuse to make payment of any Reward that would otherwise be payable if, in its absolute discretion, it considers that the claim for the Reward is an attempt to "game" the Offer. An example of gaming that would not result in payment of a Reward would be transferring an account and leaving the amount in cash for an extended period or withdrawing a material amount during that period.

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## CLAIMING THE AUTUMN 2023 TRANSFER CASHBACK REWARD

Rewards are not paid automatically. You need to actively claim a Reward, as set out below.

To claim a Reward, please complete the claim form found [here](#) including your account number by no later than 30 November 2023. By completing the claim form, you accept these T&C.

If you claim a Reward in accordance with the terms of these T&C, from 31 May 2024 Bestinvest will assess whether you met the Offer requirements. The Bestinvest Client Relations team will contact you via telephone or email to confirm if you qualify, how much you have qualified for and if the cash will be applied to your account or to your bank account. Bestinvest will then make payment of the Reward to you within 90 days after verifying that the requirements were met.

Rewards will be paid into an open investment account or your bank account (subject to standard checks).

## CHANGES TO THESE T&C OR THE AUTUMN 2023 TRANSFER CASHBACK OFFER

We may revise these T&C at any time by updating them on our website.

We reserve the right to terminate the Offer at any time, without notice.

In the event the Offer is terminated, Bestinvest will not be obliged to pay Rewards to any accounts that would otherwise have qualified for them on or subsequent to the termination date.

## GOVERNING LAW

These T&C are legally binding and shall be governed and construed in accordance with the laws of England and Wales or with the laws of Scotland if you live in Scotland or with the laws of Northern Ireland if you live in Northern Ireland. Both you and we submit to the non-exclusive jurisdiction of the courts of England and Wales, or the Scottish courts if you live in Scotland or the courts of Northern Ireland if you live in Northern Ireland.