

## BESTINVEST MONTHLY SAVERS PRIZE DRAW TERMS AND CONDITIONS

### GENERAL

1.1 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", "us", "our" or "Bestinvest".

1.2 These T&C govern our monthly savers prize draw ("Prize draw"). The monthly Prize draws will take place for monthly savings in place between 1 August 2023 and 12 July 2024 (the "Qualifying Period") unless it is changed, replaced or withdrawn by us earlier.

1.3 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 this T&C.

1.4 Payment of the Prize (as defined in clause 2.1 below) to winners is automatic – there is no need to claim the Prize.

1.5 You can only win the Prize once in the Qualifying Period.

### PRIZE DRAW REQUIREMENTS

2.1 Any Bestinvest client who is 18 years or older and sets up a monthly saving of £50 or more will be entered into our monthly Prize draw and one winner will be selected at random to receive a cash payment of £250 ("Prize").

2.2 As long as you have set up a monthly saving of at least £50 before the 12th of each month you will be entered into the Prize draw automatically.

2.3 Your monthly saving can be set up by direct debit within your Bestinvest account or via standing order with your bank.

2.4 To qualify for the Prize draw, you must meet the requirements as set out above. We reserve the right to cancel any Prize due to you if your Account is closed, either by you or us, during the Qualifying Period.

### COMMUNICATING WITH THE WINNER

3.1 Bestinvest will contact each month's winner via telephone or email to confirm how the Prize will be applied to your Account or to your bank account. Bestinvest will then make payment of the Prize within a reasonable time after verifying that the requirements were met.

3.2 Payment of the Prize will depend upon the type of Account to which it relates, as set out below:

3.2.1 Prizes for Investment Accounts (including Joint Investment Accounts) will be paid into that Investment Account.

3.2.2 Prizes for ISA Accounts and SIPP Accounts will be paid into the bank account that you nominate (subject to standard checks). The Prize will appear on your bank statement as 'BestinvestMS250'.

3.3 We may ask you to take part in publicity relating to the Prize draw, but you don't have to agree to this.

### CHANGES TO THESE T&C OR THE PRIZE DRAW

4.1 We reserve the right to amend, alter or terminate the Prize draw at any time, without notice. In such case, we will update the website.

### GENERAL

5.1 You must correctly account for any benefits you have received under the Prize draw and include them in any returns you submit to your tax authority. Any taxes or other charges that arise as a result are your responsibility.

### GOVERNING LAW

6.1 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.