

BESTINVEST TRANSFER CASHBACK OFFER TERMS AND CONDITIONS

1. 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 transfer cashback offer ("Transfer Cashback Offer").
- 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 these T&C.
- 1.4 Payment of cashback is not automatic. You need to take steps to claim your Transfer Cashback Reward (see section 3, below).
- 1.5 The Transfer Cashback Offer cannot be used in conjunction with any other Bestinvest offer or promotion.

2. TRANSFER CASHBACK OFFER REQUIREMENTS

- 2.1 Any new Bestinvest customer or existing client who initiate account transfers in full between 10 January 2023 and 15 March 2023 and invests it is eligible for a cashback payment ("Transfer Cashback Reward").
- 2.2 This offer is for investment account transfers from other financial services providers, not for cash payments made from bank accounts or transfers between Bestinvest accounts. Investment account types that can be transferred from other providers include but are not limited to general investment accounts, ISA accounts, Junior ISA accounts and SIPPs.
- 2.3 The "Transferred Account Value" means:
- an amount of one thousand pounds (£1,000) or more, as set out in the table below;
 - that is transferred into one Account, with the transfer initiated between 10 January 2023 and 15 March 2023; and
 - that is continuously held in that Account from 15 March 2023 to 15 September 2023.
- 2.4 The Transferred Account Value and corresponding Transfer Cashback Rewards are set out in the following table:

| Transferred Account Value | Transfer Cashback Reward |
|---------------------------|---|
| Less than £1,000 | Not eligible for Transfer Cashback 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 |

- 2.5 The Transfer Cashback Offer applies on a per customer basis, not a per Account basis.
- 2.6 The relevant figure is the Transferred Account Value. 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.
- 2.7 The Transfer Cashback Offer is made on a fair-usage basis. The purpose of the Transfer Cashback Offer is to incentivise customers to transfer existing investment accounts held with other providers. Bestinvest may refuse to make payment of any Transfer Cashback Reward that would otherwise be payable if, in its absolute discretion, it considers that the claim for the Transfer Cashback Reward is an attempt to "game" the Transfer Cashback Offer. An example of gaming that would not result in payment of a Transfer Cashback Reward would be transferring an account and leaving the amount in cash for the full six months.

3. CLAIMING THE TRANSFER CASHBACK REWARD

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

3.2 To claim a Transfer Cashback Reward, please send an email to offers@bestinvest.co.uk quoting promotion code "BestTransferOffer" and including your account number by no later than 30 June 2023. By sending such email you accept these T&C.

3.3 If you claim Transfer Cashback Reward in accordance with clause 3.2 above, from 15 September 2023 Bestinvest will assess whether you met the Transfer Cashback Offer requirements. The Bestinvest Direct 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 Transfer Cashback Reward to you within a reasonable time after verifying that the requirements were met.

3.4 Payment of the Transfer Cashback Reward will depend upon the type of Account to which it relates, as set out below.

3.5 Transfer Cashback Rewards for Investment Accounts (including Joint Investment Accounts) will be paid into that Investment Account.

3.6 Transfer Cashback Rewards for ISA Accounts and Junior ISA Accounts will be paid into the ISA Account or Junior ISA Account, so long as there is sufficient tax-free allowance remaining for the current tax year to accommodate the Transfer Cashback Reward. If not, the Transfer Cashback Reward can be paid into another Account held by the same customer (for instance, an Investment Account), or failing this, we will send the money to a bank account that you nominate (subject to standard checks). It is the responsibility of the customer account owner to manage their own allowance restrictions for their specific accounts.

3.7 Transfer Cashback Rewards for SIPP Accounts or ISA accounts that do not have sufficient allowance remaining will be paid into a bank account that you nominate pending bank verification checks.

4. CHANGES TO THESE T&CS OR THE TRANSFER CASHBACK OFFER

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

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

4.3 In the event the Transfer Cashback Offer is terminated, Bestinvest will not be obliged to make pay Transfer Cashback Rewards to any Accounts that would otherwise have qualified for them.

5. GOVERNING LAW

5.1 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.