

AJ Bell Youinvest autumn cashback offer terms and conditions

- Subject to the terms below, the offer is to receive a cash payment, ranging between £50 and £1,000, when you transfer a pension to AJ Bell Youinvest. The offer is open between 2 September and 29 November 2019 (“Offer Period”) – or until all cashback has been claimed.
- The offer is limited to a total pay out of £75,000. Any claims made after this amount has been reached will be honoured at the sole discretion of AJ Bell Management Limited.
- The cashback offer is only applicable to a transfer of a defined contribution pension to an AJ Bell Youinvest Self Invested Personal Pension (SIPP). Other account types, including Junior SIPPs, are not included in this offer.
- The amount of cashback that can be claimed is dependent on the value of the pension transferred. The table below outlines cashback pay out values:

You transfer	We'll pay you
£10,000–£49,999.99	£50
£50,000–£99,999.99	£125
£100,000–£199,999.99	£250
£200,000–£999,999.99	£500
£1m+	£1,000
- To be eligible, you must initiate a transfer in the offer period and it must be completed within 6 months.
- To receive cashback, you must email SIPPcashbackoffer@youinvest.co.uk with your account number within the Offer Period. You will not receive cashback automatically when making a transfer.
- If your claim is valid, the cashback will be paid into the nominated bank account associated with your AJ Bell Youinvest account within 30 days of transfer completion. It is the responsibility of the account holder to ensure the details we hold are up to date. Bank account details can be updated by clicking ‘Change my bank details’ in the ‘My account’ menu when you log into your account on the website. Where a bank account has not been verified, we will require a certified copy of a bank statement or a downloaded pdf copy of a bank statement before processing any cashback.
- Claims are only valid for defined contribution pension transfers from another provider. Cash contributions will not qualify for any cashback.
- Transfers from defined benefit/final salary pensions and other AJ Bell pensions (e.g, from AJ Bell Investcentre), are excluded from this offer.
- The value of the cashback will be based on the total value of transfers made per person within the Offer Period, not the value of each transfer.
- Only one cashback payment can be claimed per person. Amalgamated claims between different customers will not be accepted (e.g. between husband and wife).
- The maximum you can claim is £1,000.
- The cashback offer cannot be used in conjunction with our existing transfer offer (<https://www.youinvest.co.uk/our-services/special-offers/transferinoffer>). Depending on your personal circumstances, it may be more beneficial to you to make a claim on the existing transfer offer rather than this cashback offer. Please consider which offer will benefit you most. We will not provide any advice or recommendations.
- We reserve the right to reclaim the cashback paid if the value of the SIPP is reduced by more than 75% by a transfer out, annuity purchase, tax-free cash, drawdown payments or uncrystallised funds pension lump sum in the 12 months following the transfer in to AJ Bell Youinvest.
- This offer is open to customers of AJ Bell Youinvest only.
- If you are a new customer, you will need to open an AJ Bell Youinvest account before you can participate in this offer. We will not be responsible for any delay or any failure to claim the offer within the Offer Period.
- AJ Bell Youinvest will not be held liable if any unforeseen event means that we are unable to fulfil this offer. In this event, no compensation will be payable by us.
- All our existing product terms and conditions apply in addition to the terms and conditions specific to this offer.

19. Employees of AJ Bell, their affiliated companies, their advertising agencies, and the immediate families of any such employees are not eligible for the offer.
20. You must be 18 or over and resident in the UK to make a claim.
21. By participating in the offer, all entrants are deemed to accept these terms and conditions.
22. The Promoter of this offer is AJ Bell Management Limited. The Promoter's principal place of business is at 4 Exchange Quay, Salford Quays, Manchester, M5 3EE. The Promoter may, at its sole discretion, change the period for which the offer will be available and the Promoter reserves the right to alter, amend or withdraw these terms without prior notice. The Promoter may exclude from participation anyone who we believe to be taking unfair advantage of the offer.