

# SIPP, ISA and Dealing account transfer terms and conditions

1. The offer is to pay you up to £500 towards the costs of any in specie charges and exit fees you have to pay your old provider for transferring your SIPP, ISA or Dealing account to us.
2. We will pay up to £35 per line of stock for in specie transfers and up to £100 for exit fees (as applicable).
3. For us to pay you up to £500 (in cash only), you need to provide copies of the documentation or statements confirming the transfer costs you've paid to your old provider for moving your SIPP, ISA or Dealing account to us.
4. You must transfer a SIPP, ISA or Dealing account with a value of at least £20,000 at the date of your instruction to transfer. We may waive this requirement at our discretion.
7. All existing product terms and conditions apply in addition to the terms and conditions specific to this offer.
8. You must keep the transferred assets in your account(s) for at least 12 months. If you close the account(s) into which the assets were transferred within 12 months then we reserve the right to reclaim the cash payment of up to £500.
9. By participating in the offer all participants agree that we won't be liable for any costs, expenses, loss or damage sustained or incurred by any participant with regards to the offer.
10. The offer is open to both new and existing clients.
11. The offer is only available to individuals and you must be resident in the UK to qualify.
12. By participating in the offer, all entrants are deemed to accept these terms and conditions.
13. The promoter of this offer is AJ Bell. 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. In all matters relating to the promotion, our decision is final.

We will accept either an email from you (with the documentation attached) or you can post your documentation to us.

**Email**

transferoffer@ajbell.co.uk

**Post**

AJ Bell Transfer In Offer  
Dealing Services Team  
4 Exchange Quay  
Salford Quays  
Manchester  
M5 3EE

5. If your claim is valid and your transfer is complete, we'll then pay the £500 (maximum) into your nominated bank account within 28 days of us receiving your claim.
6. Only one cash payment of up to £500 per person will be paid.