

SIPP Funding Wine offer terms and conditions

1. Subject to the terms below, the “offer” is to receive one mixed case (12 bottles of 75cl in size) of wine selected by Laithwaite’s Wine when you fund an AJ Bell Youinvest SIPP, subject to a minimum value of £10,000. Bottles are set and cannot be changed.
2. The deadline to claim is 90 days after the date the offer email or letter was sent (“Offer Period”)
3. To qualify, you must fund, or complete a transfer into, an AJ Bell Youinvest SIPP of at least £10,000 within the Offer Period. Any transfers or payments that complete before or after the Offer Period are not eligible for this offer.
4. For a SIPP the minimum funding level of £10,000 is net of tax relief for current year contributions. Any tax reclaimed on your behalf and added to your account will not count towards the £10,000 minimum funding level. Please note that this amount may be higher than your own allowance if you have a high income or have flexibly accessed your pension benefits. If you have enhanced or fixed protection, making a contribution to your SIPP will mean your protection is lost.
5. You must be 18 or over and resident in the UK to take part in the offer. Laithwaite’s Wine cannot deliver to the Channel Islands or British Forces Post Office (BFPO) addresses.
6. To claim your case of wine email offers@youinvest.co.uk with your SIPP account number and the amount you’ve funded or transferred.
7. This offer is only open to existing AJ Bell Youinvest customers that have an AJ Bell Youinvest account and receive the offer email or letter.
8. The offer does not apply to ISAs, Dealing accounts, Lifetime ISAs, Junior ISAs or Junior SIPPs.
9. The offer is limited to 75 cases of wine. This offer is running in conjunction with another offer to AJ Bell Youinvest customers for a case of wine. There are a total of 75 cases of wine available under both offers on a first come first served basis. Any claims made after this number has been reached will be honoured at the discretion of AJ Bell Youinvest.
10. Our transfer offer (details of which can be found here <https://www.youinvest.co.uk/our-services/special-offers/transferinoffer>) can be used in conjunction with this offer.
11. If your claim is valid, we will send the case of wine within 30 days of the end of the Offer Period.
12. Delivery will be to the address held on our records, unless you notify us otherwise. AJ Bell Youinvest and Laithwaite’s Wine will not be held responsible if the address is wrong or if there is a delivery error.
13. The offer may be withdrawn at any time.
14. AJ Bell Youinvest accepts no responsibility for any transfers that have not successfully completed during the Offer Period for any reasons, including (but not limited to) any delays caused by a technical fault of any kind.
15. AJ Bell Youinvest will not be held liable if any unforeseen event means that we are unable to fulfil the offer. In this event, no compensation will be made.
16. All our existing product terms and conditions apply in addition to the terms and conditions specific to this offer.
17. Employees of AJ Bell or Laithwaite’s Wine, or each of their affiliated companies, their advertising agencies, and the immediate family of any such employees are not eligible for the offer.
18. By participating in the offer all participants agree that AJ Bell Youinvest won’t be liable for any costs, expenses, injury, loss or damage sustained or incurred by any participant or other party with regards to the offer.
19. You must be an AJ Bell Youinvest customer at the time we dispatch the case of wine and must not have submitted an application for the transfer of any AJ Bell Youinvest accounts to another provider.
20. This offer is limited to one claim per customer. Amalgamated claims between different customers will not be accepted (e.g. between husband and wife).
21. This offer is in no way sponsored, endorsed or administered by, or associated with Laithwaite’s Wine.
22. There is no cash alternative.

23. By participating in the offer, all entrants are deemed to accept these terms and conditions and acknowledge that AJ Bell Management Limited will share each entrant's name, address and contact details with Laithwaite's Wine and its carriers for the purpose of delivering the mixed case of wine.
24. 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 scheme.