

Wine offer terms and conditions

1. The “offer” is one mixed case (12 bottles of 75cl in size) of wine selected by Laithwaite’s Wine. Bottles are set and cannot be changed.
2. Subject to the below, the offer is open between 12 February – 23 April 2018.
3. To qualify, you must open and fund an AJ Bell Youinvest SIPP within the offer period with a minimum of £10,000. Transfers are accepted and must be initiated before the offer period ends.
4. A net amount of £10,000 or more must be added when funding a SIPP in order to be eligible for the offer. Any tax reclaimed by us on your behalf and added to your account will not count towards the £10,000 minimum funding level.
5. To claim the offer, after opening and funding a SIPP within the offer period you must confirm your communications preferences in the ‘My account’ area (if you have not already done so) and fill out a short form found at www.youinvest.co.uk/our-services/special-offers/free-case-of-wine.
6. Transfers of £10,000 or more will be accepted. Our transfer offer can be used in conjunction with this offer.
7. If your claim is valid, we will send the case of wine within 30 days of the later of the offer period ending and completion of a transfer.
8. Delivery will be to the address held on our records. AJ Bell Youinvest and Laithwaite’s Wine will not be held responsible if the address is wrong or if there is a delivery error.
9. The offer is limited to 400 cases of wine. Any claims made after this number has been reached will be honoured at the discretion of AJ Bell Youinvest.
10. The offer may be withdrawn at any time.
11. 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.
12. This offer is open to new and existing customers.
13. This offer only applies to SIPPs opened within the offer period stated in point 2. Claims for funded Dealing accounts, Stocks and shares ISAs, Lifetime ISAs, Junior ISAs and Junior SIPPs, or SIPPs opened before the offer period will not be valid.
14. All our existing product terms and conditions apply in addition to the terms and conditions specific to this offer.
15. Employees of AJ Bell and Laithwaite’s Wine, their affiliated companies, their advertising agencies, and the immediate family of any such employees are not eligible for the offer.
16. 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.
17. 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.
18. This offer is limited to one claim per customer.
19. This offer is in no way sponsored, endorsed or administered by, or associated with Laithwaite’s Wine.
20. There is no cash alternative.
21. 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.
22. 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.
23. 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.