

Terms and Conditions

Refer a Friend or Family Member Promotion

1. To take advantage of this promotion the Referrer (being the person who is referring a friend or family member to us) must be an existing client of Schroders Personal Wealth's Financial Advice Service, meaning that they have received or are in the process of receiving financial advice from us, and either:

- i) complete the online form for this promotion with their own details and the details of the friend or family member being referred to us, or share their unique code with their friend or family member for use; or
- ii) provide the details of the friend or family member being referred to their Personal Wealth Adviser;

and the Referred Client (being the friend or family member referred to us) must:-

- iii) not be an existing client of Schroders Personal Wealth, meaning that they must not have previously received or be in the process of receiving financial advice from us;
- iv) become a client of Schroders Personal Wealth's Financial Advice Service and receive advice from us which provides a new product recommendation that they proceed with through us. Please be aware that any advice recommendation will be made in accordance with the suitability of the solution for the Referred Client's circumstances and will not be influenced by participation in this promotion; and
- v) complete the online form for this promotion with their details, providing the unique code from their friend or family member who has referred them if applicable.

2.

- (a) The Referrer and the Referred Client will each receive 200 points to spend on a gift available via the Simply Thank You portal.
- (b) For the avoidance of doubt, where our service is provided to joint clients (for example, spouses or partners receiving advice together) we treat this as one referral.
- (c) There is no limit to the number of referrals a Referrer can make.
- (d) No cash alternative to these rewards will be offered.
- (e) We may substitute a reward of equivalent or greater value if this is necessary for reasons beyond our control.

3. By completing the online form(s) for this promotion the Referrer and Referred Client will be deemed to have accepted these terms, and if the referral is successful, the full name and email address of the Referrer and Referred Client will be shared with Simply Thank You Limited for the purpose of reward fulfilment. More information about them and their privacy policy can be found at simplythankyou-corporate.com. Their registered office is at Richmond Court, Morton Road, Darlington, Co. Durham DL1 4PT. Registered in England and Wales No. 04094597.

4. The promotion is available from 30th March 2023. It may be withdrawn, amended or extended at any time. It cannot be used in conjunction with any other offer or promotion.

5. English law applies to this promotion.