



Don't make us your  
best kept secret.

Refer a friend to  
Alliance Trust Savings.

We'll thank you with **£50** in  
Marks & Spencer vouchers.  
And welcome your referred  
friend with **£25** of vouchers too!





## Spread the word

If you're happy with the products and service you receive from Alliance Trust Savings why not tell your family and friends about us so they can benefit too. Don't make us your best kept secret.

It's nice to share good things with friends – and now we've made it even better. If you're an existing Alliance Trust Savings customer, you can refer a friend to Alliance Trust Savings and if they open an Investment Dealing Account, ISA or SIPP we'll thank you with a £50 Marks & Spencer Voucher\*.

To thank your friend for opening an account we will send them a voucher worth £25.

## How to get your rewards

Once your friend has applied for an Alliance Trust Savings account, they need to trade through it within 120 days of the account opening and send in the tear off leaflet. Once we have received it, we will process your vouchers for despatch. It can take up to 60 days for your reward to arrive via special delivery.

To download more refer a friend forms, go to [www.alliancetrustsavings.co.uk/friend](http://www.alliancetrustsavings.co.uk/friend)

### Risk Warning

Alliance Trust Savings provides an execution-only service and does not give advice. If your friend is unsure about whether to invest or about the suitability of an investment, we recommend that they seek advice from an independent financial adviser. The value of investments and any income from them can go down as well as up and is not guaranteed. They may not get back the full amount they invested.

### Terms and conditions

\* You and your friend will qualify for your vouchers if you recommend a friend, who isn't already an Alliance Trust Savings customer who then opens up an Alliance Trust Savings account, trades through it and has paid fees and charges as they become due within 120 days of the account opening. The application from your friend must be for an individual and not a corporate account. This offer excludes First Steps accounts as these are opened and held in the name of an adult on behalf of a child. There is no limit to the number of friends you can refer in a year. You must not recommend friends as part of your business. Your referral is made only so that your friend can independently decide to open our accounts. There is no reason known to you that would stop you or your friend receiving these vouchers. We must receive the completed Refer a Friend application from your friend within 120 days of the account opening, before the voucher will be issued. This offer is subject to Alliance Trust Savings standard promotion and competition terms and conditions found at [alliancetrustsavings.co.uk/friend](http://alliancetrustsavings.co.uk/friend). We may use the customer details provided to contact you or your friend in the future regarding our products and services. If you'd prefer not to be contacted please contact us. This offer is only available to existing Alliance Trust Savings customers.

Alliance Trust Savings Limited is a subsidiary of Alliance Trust PLC and is registered in Scotland No. SC 98767, registered office, PO Box 164, 8 West Marketgait, Dundee DD1 9YP; is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, firm reference number 116115.

Alliance Trust Savings gives no financial or investment advice.

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# It's Easy

Are your friends comfortable making investment decisions and managing their wealth? If the answer is yes, then refer them to Alliance Trust Savings.

## What you need to do

- 1 Please complete your details below.
- 2 Pass this leaflet to your friend. It has a space for them to complete their new account details and it folds and seals so it can be easily posted back.

## What your friend needs to do

- 1 Go to **www.alliancetrustsavings.co.uk** and open an account online.
- 2 Complete the 'New Customer' details below.
- 3 Fold and seal the form and post it back to us.

### Existing Customer Details (please complete your details below)

<b>Name:</b>	<input type="text"/>	
<b>Client Reference:</b>	<input type="text"/>	<b>Account Number:</b> <input type="text"/>
<b>Address:</b>	<input type="text"/>	
	<input type="text"/>	
<b>Postcode:</b>	<input type="text"/>	
<b>Email:</b>	<input type="text"/>	
<b>Date of Referral:</b>	<input type="text"/>	

Fold here

Fold here

### New Customer Details (to be completed)

<b>Name:</b>	<input type="text"/>	
<b>New Customer ID:</b>	<input type="text"/>	
<b>Account Number:</b>	<input type="text"/>	
<b>Address:</b>	<input type="text"/>	
	<input type="text"/>	
<b>Postcode:</b>	<input type="text"/>	
<b>Email:</b>	<input type="text"/>	
<b>Tel:</b>	<input type="text"/>	

Moisten, fold and seal

Moisten, fold and seal

### New customer to read and sign:

I have been told about Alliance Trust Savings by the person named as the existing customer on this form. I know the value of the vouchers they will receive from you and agree that they can receive them. I have not received advice from them.

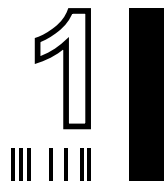
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**Signed:**

**IF THESE DETAILS ARE INCORRECT OR ILLEGIBLE YOUR FRIEND MAY NOT RECEIVE THEIR REWARD**

Moisten, fold and seal

Business Reply  
Licence Number  
RSBL-KYGL-KUHC



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