

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!

Terms & Conditions apply.





Spread the word

If you're happy with the products and services 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 – and now we've made it even better. If you're an existing Alliance Trust Savings customer, you can refer someone 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 and them with a £25 Voucher*.

How to get your rewards

Once your family member or 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. 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

Risk Warning

Alliance Trust Savings provides an execution-only service and does not give advice. If your family member or friend is unsure about the suitability of an investment, we recommend that they seek advice from a 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 family member or friend will qualify for your vouchers if you recommend someone, 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 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 people you can refer in a year. You must not recommend anyone as part of your business. Your referral is made only so that they can independently decide to open an Alliance Trust Savings account. There is no reason known to you that would stop you or the person you are referring 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. 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 let us know. 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.

It's Easy

Do you know someone who is comfortable making investment decisions? 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 family member or 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 they need 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)

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

Fold
here

Fold
here

New Customer Details (to be completed)

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

New customer to read and sign:

I have been referred to 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.

ATS GEN INT 0002

Signed:

IF THESE DETAILS ARE INCORRECT OR ILLEGIBLE YOU AND THE PERSON YOU ARE REFERRING MAY NOT RECEIVE THEIR REWARD

Business Reply
Licence Number
RSBL-KYGL-KUHC



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