

Refer a Friend Offer

# THE BEST THINGS ARE WORTH SHARING



Get a **£100 Marks and Spencer  
Gift Card** for each friend you  
refer to Alliance Trust Savings

If you value the services we offer, why not spread the word? Referring a friend to Alliance Trust Saving is simple and rewarding for everyone.

You'll receive a £100 Marks and Spencer Gift Card as a thank you. And we'll welcome your friend with a £50 Marks and Spencer Gift Card too.

Plus, you can refer as many people as you like.

## HOW TO GET YOUR REWARDS



### What **YOU** need to do

1. Complete the **Existing Customer Details** section of our *Refer a Friend Form*.
2. Pass on your completed Refer a Friend Form to your friend so they can add their details.



### What **YOUR FRIEND** needs to do

1. Go to [alliancetrustsavings.co.uk](http://alliancetrustsavings.co.uk) and open an ISA, SIPP or Investment Account online.
2. Trade through their new Account within 120 days of opening.
3. Complete the **New Customer Details** section of the *Refer a Friend Form*.
4. Fold, seal and return to us.



### What **WE** do

Within 60 days of receiving your completed *Refer a Friend Form* and confirmation that the new Account has been opened and a trade placed, we'll send the Gift Cards via special delivery.

## Important Information

Alliance Trust Savings provides an execution-only service and does not give financial or investment advice. If you are unsure about the suitability of an investment, we recommend that you seek advice from a financial adviser. The value of investments can go down as well as up and you may get back less than you originally invested.

# REFER A FRIEND FORM



Additional forms can be downloaded at [www.alliancetrustsavings.co.uk/literature](http://www.alliancetrustsavings.co.uk/literature)

Please complete in block capitals and black ink and return.

## Existing Customer Details

Name:	<input type="text"/>	
Alliance Trust Savings Client Reference:	Alliance Trust Savings Account Number:	<input type="text"/>
Address:	<input type="text"/>	
	<input type="text"/>	
Postcode:	<input type="text"/>	
Email:	<input type="text"/>	

## New Customer Details

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

Fold here

Fold here

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 Gift Cards they will receive from you and agree that they can receive them. I have not received advice from them. I have read and understand the Important Information and I accept the Terms and Conditions. I agree to the use of my personal data by Alliance Trust Savings in connection with this Offer. More information on our *Data Privacy Policy* detailing how we use and manage your personal data can be found at [www.alliancetrustsavings.co.uk/privacy-policy](http://www.alliancetrustsavings.co.uk/privacy-policy).

Signature:	<input type="text"/>	Date:	<input type="text"/>
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## Terms and Conditions

You and your friend will qualify for Marks & Spencer Gift Cards if you recommend someone, who isn't already an Alliance Trust Savings customer and they open a self-directed Alliance Trust Savings Account online, trade through it and have paid the fees and charges within 120 days. The application must be for an individual and not a corporate Account. This offer excludes First Steps as these Accounts 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 Gift Cards. This offer is subject to Alliance Trust Savings *Standard Promotion and Competition Terms and Conditions* found at [www.alliancetrustsavings.co.uk/competition-terms-and-conditions](http://www.alliancetrustsavings.co.uk/competition-terms-and-conditions). 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.

Business Reply  
Licence Number  
RSBL-KYGL-KUHC



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