

Transfer-In Offer

Promotion Terms & Conditions

1. These terms of offer should be read in conjunction with the Shareview Dealing (“our”, “us” or “we”) Terms and Conditions and in the event of a conflict between these terms of offer and the Shareview Dealing Terms and Conditions, these terms shall prevail.
2. The Transfer-In Offer (the “offer”) is for a payment of up to £100 to be paid in respect of costs incurred in transferring an existing account with another provider to Shareview Dealing. Paragraphs 6 & 7 set out which costs will qualify and any proof of costs required.
3. Payments are available on all eligible Investment Account and Shareview Dealing ISA transfer requests received by us from 11 April 2018. The exclusions set out in paragraph 11 apply to this offer.
4. Claims must be submitted once any transfer has completed. Your claim should be made by secure message on the Shareview Dealing website or by telephone to our Customer Experience Centre on 0345 300 0430 (or +44 121-415-0105 if you are calling from a mobile or overseas). Our opening hours are 8.00 to 18:00, Monday to Friday (excluding Bank Holidays).
5. We can only accept a transfer into a Shareview Dealing ISA from other stocks and shares ISAs or cash ISAs.
6. To be eligible for the offer, the transferred stock and cash balances must have a value of £1,000 or more. Transferred stock is valued on the date we process the existing plan manager's valuation, using the closing price of the shares or units on the previous working day. The transfer process ordinarily takes no more than 30 days from the date of your transfer request, but in certain circumstances it may take longer.
7. Proof of the costs incurred will be required before any payment is made. Only costs incurred for the transfer to Shareview Dealing will qualify to be reimbursed. No third-party costs will qualify.
8. Payments will be credited to your Investment Account. This will not be paid until the full completion of the transfer.
9. We shall not be obliged to accept the transfer of any account and we reserve the right to alter, withdraw or amend this offer at any time.
10. If you close an account within 12 months of qualifying for and receiving a payment under the terms of this offer, except in the event of death, we will reclaim the payment made in full in respect of the closed account.

In general, we will attempt to deduct the full payment from the cash balance of the account the payment was credited to, unless requested otherwise. You may contact us and repay the value of the payment by debit card if you would prefer.

If there is insufficient funds to cover the payment in full from your account, if necessary, we will sell stock, prior to a transfer out or final account closure and settlement.
11. This offer is not available to:
 - anyone who is not a UK resident or anyone who is under 18 years of age
 - any assets held in an existing Equiniti Investment account or ISA on or prior to 11 Apr 2018.
 - non-personal accounts e.g. trust accounts.

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12. All participants to this offer agree to be bound by these terms of offer.

13. This offer is governed by the laws of England and Wales and is subject to the exclusive jurisdiction of the English courts.

Date Issued: November 2020

Shareview Dealing is provided by Equiniti Financial Services Limited. Equiniti Financial Services Limited is part of the Equiniti Group. Their registered offices are Aspect House, Spencer Road, Lancing, West Sussex BN99 6DA. Investment and general insurance services are provided through Equiniti Financial Services Limited, which is registered in England & Wales with no. 6208699 and is authorised and regulated by the UK Financial Conduct Authority (FCA register no. 468631). Equiniti Financial Services is a member of the London Stock Exchange.