

SIPP cashback offer terms

1. Subject to these offer terms, you will be entitled to receive a cashback payment from Interactive Investor Services Limited (“**ii**”, “**us**”, “**we**” or “**our**”) if you submit a Qualifying Transfer to us (as defined below) between 1 July 2023 and 30 September 2023 (inclusive) (the “**Offer Period**”). The cashback amount will be calculated in accordance with the table below.

Aggregate Qualifying Transfer amount	Cashback
£10,000 - £24,999.99	£100
£25,000 - £199,999.99	£200
£200,000 - £499,999.99	£750
£500,000 - £999,999.99	£1,500
£1,000,000+	£3,000

2. The offer only applies to any requests made by you during the Offer Period to transfer a pension from another pension provider into a new or existing ii SIPP (each a “**Qualifying Transfer**”). For the avoidance of doubt, the offer does not apply to investments already held in an ii account (including Pension Trading Account), to transfers of investments between existing ii accounts and/or to transfers into any ISA, Junior ISA, Trading Account and/or Pension Trading Account.
3. Cashback is only payable to you if you complete Qualifying Transfers with an aggregate value of at least £10,000. Any cashback payable to you under this offer may be paid in one or more instalments, at our discretion. We reserve the right to determine in our absolute discretion the valuation of each Qualifying Transfer and the amount of cashback payable. Non-cash assets will generally be valued on the date we process the existing provider’s valuation, using the closing price of the shares or units on the previous working day. The maximum cashback you can receive under the offer is £3,000.
4. You must be over 18 and a UK resident to be eligible for the offer.
5. You must be living at a UK residential address at the time of submitting and completing your Qualifying Transfer.
6. We will only pay cashback into a Trading Account that is linked to your ii SIPP. Cashback will be credited to your Trading Account by the later of: (i) the date falling 30 days after the last relevant Qualifying Transfer is completed; and (ii) the date falling 30 days after the date on which you open a Trading Account. Cashback sums will not be paid by any other means.
7. If you are a member of our Pension Builder plan and are unable to open a Trading Account as a result of this, we will pay cashback into the nominated bank account that is linked to your ii SIPP. Cashback will be credited to your bank account by the later of: (i) the date falling 30 days after the last relevant Qualifying Transfer is completed; and (ii) the date falling 30 days after the date in which we verify the nominated bank details on your account. Cashback sums will not be paid by any other means.
8. The offer is not intended to be taken as advice or any personal recommendation to transfer any investment(s) from your existing provider. If you are unsure whether transferring is right for you, you should take independent financial advice.
9. The offer is funded by ii. Any cashback you are eligible for will not be drawn from your investments.
10. Anyone who is seen to be abusing the offer may be excluded at ii’s absolute discretion.
11. ii reserves the right to amend or withdraw these terms at any time without notice.
12. Your ongoing entitlement to any cashback received is subject to you keeping your ii SIPP open for a minimum of 12 months from the date of completion of the last Qualifying Transfer (the “**Minimum Term**”). We reserve the right to reclaim, and you agree to repay, any cashback amount paid if your ii SIPP is closed or transferred prior to the expiry of the Minimum Term. Please note that the relevant ii SIPP Terms will apply to any such transfer or withdrawal and fees as shown in our Rates & Charges may apply.
13. These offer terms are governed by English law.
14. 14. These terms must be read in conjunction with the relevant ii SIPP Terms. In the event of any conflict between these terms and the relevant ii SIPP Terms, these offer terms shall prevail.
15. Interactive Investor Services Limited is the promoter of this offer. ii’s registered office is at 201 Deansgate, Manchester, M3 3NW