Terms and Conditions for Advanta Wealth Client Referral Scheme

Effective from 1 February 2025

These Terms and Conditions govern the Client Referral Scheme offered by Advanta Wealth. By participating, you agree to the following:

Eligibility

- Both the referrer and the referred client must be 18 years or older.
- The referrer must be a current client of Advanta Wealth.
- The referred client must be suitable for and engage to receive the Lifetime service from Advanta Wealth and meet our minimum fee requirements as set out in our Costs and Services Document on page 10. Should you require a copy of this document, your adviser will be happy to provide you with one.
- Should you have a introducers agreement in place with Advanta Wealth you are not eligible for the Client Referral Scheme.

Referral Process

- The referrer must provide accurate details of the referred client and ensure you have the permission of the referred client to provide their details to us.
- Advanta Wealth will assess the referred client's suitability for its services.
- We will notify the referrer of the successful referral within 3 months of the first receipt of an ongoing fee from the referred client. The referral gift will be issued within 30 days of the successful referral notification.

Referral Reward

- The referrer will receive a reward for each qualified referral.
- The reward is non-transferable and cannot be exchanged for cash.
- The experience of a lifetime will be provided in the form of a Virgin 'The Azure Collection' voucher.
- Please note that Operators and Suppliers reserve the right to alter any part of an Experience or Product. Experiences and Voucher Products may occasionally be withdrawn for reasons outside of our control, and we cannot be held liable for any costs incurred as a result of this. Should this occur, you will be advised and offered the opportunity to exchange your Voucher for one with the same face value.
- Charitable donations will be made to the Advanta Foundation unless an alternative registered charity is selected at the point the referral is made. The donation amount will be at least £125, but subject to the discretion of Advanta Wealth, we may from time to time elect to make a larger donation. All charities must be registered with either the OSCR, Scottish Charity Regulator or the Charity Commission for England and Wales.
- The wine reward will be a specially selected bottle of '100 Point' wine.

Confidentiality

- Due to confidentiality, Advanta Wealth cannot share details of the referred client's application progress.
- All personal and financial information will be handled according to Advanta Wealth's Privacy Policy which can be found here: Privacy Policy • Advanta Wealth.
- You must have asked for consent to provide the contact information of the individual you are referring.

General Conditions

- Advanta Wealth reserves the right to amend or terminate the scheme at any time.
- Any changes will be communicated to participants who have registered their details with the client referral scheme by email.
- Advanta Wealth's decisions are final and binding.

Contact Information

If you have questions or need more information, please contact your adviser or email us directly Wealth@TheAdvantaGroup.co.uk.

Thank you for participating in the Advanta Wealth Client Referral Scheme.

All images shown are for illustration purpose only, actual product may vary from images shown.