

Recommend a friend offer

1. The person being recommended (the 'new customer') can't be an existing customer and you can't refer yourself.
2. The offer is to:
 - give the referring customer and the new customer a £100 electronic gift voucher each to spend online via our partner, Blackhawk, when a new customer opens and funds an AJ Bell SIPP or Stocks and shares ISA; and
 - give the referring customer and the new customer a free copy of 'The DIY Investor' by Andy Bell in an eBook format.
3. To qualify for this offer, the new customer must fund an AJ Bell SIPP or Stocks and shares ISA with £10,000 or more. This must be received by us within 120 days of the submission of the application to open the new account. Accounts can be funded using contributions, subscriptions, or transfers.
4. This offer is not available where the new customer opens and funds a Dealing account, Lifetime ISA, Junior ISA or Junior SIPP or transfers cash or investments from defined benefit / final salary pensions or any accounts administered or managed by any other member of the AJ Bell plc group.
5. To be eligible for this offer, your friend needs to open their account by 31 October 2023.
6. There is no limit on the number of new customers that can be recommended.
7. A new customer can only be recommended once by an existing customer. If we receive multiple recommendations for the same new customer, we will only accept the first recommendation and any other recommendations will be invalid.
8. To claim this offer, the new customer must visit <https://www.ajbell.co.uk/our-services/special-offers/recommendafriend> and follow the on-page claim process.
9. If your claim is valid, an email containing a link to download the voucher will be sent to the referring customer and the new customer's registered email addresses within 30 days of the new account being funded with the minimum amount. The new account must have a minimum balance of £10,000 at the time we are sending the email containing the voucher code and ebook link.
10. All claims under this offer must be made within 6 months of the new account being opened. Any claims made after this date will not be valid. The referring customer and the new customer must be an AJ Bell customer at the time of sending the email to them containing the voucher code and ebook link and must not have submitted an application for the closure or transfer of any AJ Bell accounts to another provider.
11. We reserve the right to reclaim the £100 vouchers if, within 12 months of claiming this offer the new customer (i) closes their account or (ii) withdraws or transfers a substantial amount of the cash or investments initially funded to their account in connection with this offer.
12. Employees of AJ Bell, its affiliated companies, their advertising agencies, and immediate families of any such employees are not eligible for the offer.
13. By participating in the offer all participants agree that AJ Bell won't be liable for any costs, expenses, loss or damage sustained or incurred by any participant with regards to the offer.
14. All our existing product terms and conditions apply in addition to the terms and conditions specific to this offer.
15. There is no alternative to the £100 electronic gift voucher or the 'The DIY Investor' ebook by Andy Bell.
16. The new customer and the referring customer must be 18 or over and resident in the UK to take part in the offer.
17. By participating in the offer, all entrants are deemed to accept these terms and conditions and our partner's [terms and conditions](#).
18. This offer can't be used in connection with any other recommend a friend offer and you can't submit a claim under this offer if you have already submitted a claim under another recommend a friend offer.
19. This offer is governed by English law and is subject to the jurisdiction of the English courts.
20. The Promoter of this offer is AJ Bell Management Limited. The Promoter's principal place of business is at 4 Exchange Quay, Salford Quays, Manchester M5 3EE. The Promoter may, at its sole discretion, change the period for which the offer will be available and the Promoter reserves the right to alter, amend or withdraw these terms without prior notice. The Promoter may exclude from participation anyone is believed to be taking unfair advantage of the offer.