



Terms of Offers

New SIPP customers

1. The promoter of this offer is Equiniti Financial Services Limited, with its correspondence address at Aspect House, Spencer Road, Lancing, West Sussex, BN99 6DA.
2. These Terms of Offer should be read in conjunction with the EQi ("our", "us" or "we") Terms and Conditions and in the event of a conflict between these Terms of Offer and the EQi Terms and Conditions, these Terms of Offer shall prevail. Definitions used in these Terms of Offer but not defined herein shall have the meanings provided in the EQi Terms and Conditions.
3. This offer (the "offer") is available to any customer, new or existing who:
 - a. Opens a Self-Invested Personal Pension (SIPP) with EQi between 18 November 2020 and 01 May 2021, and
 - b. Funds the SIPP with at least £10,000 (cash or assets) by 01 August 2021.
4. For customers who open an [EQi SIPP](#) (administered by Gaudi Regulated Services Limited), they will not be charged the annual SIPP administration fee (£118.80). This will be paid directly by EQi.
5. For customers who open a [panel SIPP](#), they will be charged the annual SIPP administration fee by their chosen SIPP provider (fee varies between providers). Once conditions 3a and 3b have been met, we will contact the customer to organise delivery of a gift card valued at £100. The customer will be given a select list of retailers from whom they can choose the gift card.
6. If the SIPP administration fee exceeds £118.80 (or £100 for a panel SIPP as is the case with most panel SIPP providers) the extra cost will not be covered under this offer.
7. This offer is valid for your first years' SIPP administration fee (up to £118.80) but not subsequent years. The fee is payable by the customer from then onwards.
8. All other EQi fees are payable. Full EQi pricing information can be found [here](#). Any other fees charged by the SIPP provider are also payable (e.g. benefits administration or transfer fees). Check these with the SIPP provider directly.
9. EQi reserves the right to alter, withdraw or amend this offer at any time.
10. All participants to this offer agree to be bound by these terms of offer.

Refer a friend (SIPP)

1. The promoter of this offer is Equiniti Financial Services Limited, with its correspondence address at Aspect House, Spencer Road, Lancing, West Sussex, BN99 6DA.
2. These Terms of Offer should be read in conjunction with the EQi ("our", "us" or "we") Terms and Conditions and in the event of a conflict between these Terms of Offer and the EQi Terms and Conditions, these Terms of Offer shall prevail. Definitions used in these Terms of Offer but not defined herein shall have the meanings provided in the EQi Terms and Conditions.
3. This offer (the "offer") is available to any customer ("referrer") who refers another person to open a SIPP on EQi ("referent").
4. For the referrer to be eligible for the £100 referral bonus, the referent must:
 - a. Open a SIPP on EQi between 18 November 2020 and 01 May 2021, and
 - b. Fund the SIPP with at least £10,000 (cash or assets) by 01 August 2021.
5. The referent can open any kind of SIPP on EQi, whether that be an [EQi SIPP](#) (administered by Gaudi Regulated Services Limited) or a [panel SIPP](#).
6. The £100 bonus can be claimed for multiple referrals as long as conditions 4a and 4b have been met.
7. The £100 bonus will be paid to the referrer within 30 days of conditions 4a and 4b being met.
8. The £100 bonus will be paid into your EQi dealing account. In the instance you do not have an EQi dealing account, we will send you a gift card valued at £100. We will contact you with a list of gift cards from which you can choose.
9. EQi reserves the right to alter, withdraw or amend this offer at any time.
10. All participants to this offer agree to be bound by these terms of offer.

Date issued: 17 November 2020