

# Santander Fixed Rate ISA Transfer Offer Terms and Conditions

## 1. The Terms

These terms and conditions (**'Terms'**) govern our Fixed Rate ISA Transfer offer (**'ISA Transfer Offer'**) of £50 (**'Voucher Payment'**) in respect of qualifying ISA transfers. The ISA Transfer Offer starts on 18 September 2023 and lasts until withdrawn by us (see condition 4.3 below).

## 2. Eligibility

To qualify for the ISA Transfer Offer and the Voucher Payment the following eligibility criteria apply:

- 2.1 You need to have instructed us to transfer the full balance you hold in an existing cash or stocks and shares ISA from an ISA manager other than us or Santander ISA Managers Limited (**'Old Account'**). This must have a balance of £10,000 or more. You must have instructed us to transfer this in to a new Santander UK plc 1 Year or 2 Year Fixed Rate ISA (**'Qualifying Account'**) using the ISA Transfer Service either in-scheme via Pay UK or out-of-scheme paper based service. The transfer in instruction must be provided on or after 18 September 2023 and before the ISA Transfer Offer is withdrawn. See condition 4.3 below.

**Please note:** If you remove any money from your Old Account it will lose its tax efficient status. If you have built up previous tax year flexible allowances with your old provider, you'll lose them if you transfer an ISA to us. To use the flexible allowance you should re-deposit into your Old Account before you transfer to us.

- 2.2 You will need to:
  - 2.2.1 Be a UK resident
  - 2.2.2 Have a valid email address registered
  - 2.2.3 Continue to hold the Qualifying Account with a balance of over £10,000 on the date we make the Voucher Payment.

**Please note:** not all ISA providers participate in the electronic ISA Transfer Scheme, and you may need to complete a paper-based transfer, which can be completed in a Santander branch or by downloading the Cash ISA Transfer form from our website and posting this to us.

## 3. Voucher Payment

- 3.1 We will assess the Qualifying Account within 30 days of the transfer completing to decide whether you have qualified for the ISA Transfer Offer and the Voucher Payment under these Terms. If you Qualify, we will make the Voucher Payment to you.

- 3.2 The Voucher Payment will be paid in the form of an e-voucher. The code to redeem the e-voucher will be valid for 12 weeks.

- 3.2.1 If you're eligible, we'll email a code to you with details of where you can redeem your e-voucher. Emails may be sent to your spam, promotions or junk folders.

- 3.2.2 Enter your code to pick an e-voucher from over 100 retailers.

- 3.2.3 Your chosen e-voucher will be sent to you by email.

- 3.2.4 The list of retailers is available on our website.

- 3.3 We will make one Voucher Payment per customer.

- 3.4 If you complete a full ISA transfer with a balance of below £10,000 from an Old Account into a Qualifying Account, it will not be eligible for a Voucher Payment. If you make more than one ISA transfer from an Old Account(s) into a Qualifying Account with a cumulative balance of £10,000 or more, this will not be eligible for a Voucher Payment. If you transfer part of the balance you hold in an Old Account which is £10,000 or more into a Qualifying Account, it will not be eligible for a Voucher Payment. Only single full ISA Transfers In with a balance of £10,000 or more into a Qualifying Account will receive a Voucher Payment.

- 3.5 We reserve the right to not make any Voucher Payment where we suspect or are made aware that the ISA Transfer Offer is being abused.

- 3.6 If you have requested an ISA Transfer after the ISA Transfer Offer starts and we subsequently withdraw the ISA Transfer offer before the ISA Transfer completes, you will be eligible for the Voucher Payment as long as you meet the eligibility criteria in condition 2 above.

## 4. General Terms

- 4.1 In these Terms 'we', 'us' or 'our' means Santander UK plc.
- 4.2 The ISA Transfer Offer is not transferable.
- 4.3 We reserve the right to withdraw, alter or replace this ISA Transfer Offer at any time and without notice to you.
- 4.4 These Terms apply in addition to and should be read together with the terms and conditions contained in our General Terms and Conditions and Key Facts Document which govern the Qualifying Account.

## 5. Administration of this offer

If you have any questions about this offer, please contact us on **0330 9 123 123**.

This offer is administered and managed on behalf of Santander by Simply Thank You. Registered in England No. 02860556, Registered Office: Richmond Court, Morton Road, Darlington, County Durham, DL1 4PT. We'll share your name, postcode, account number and email address with them so they can contact you about this offer.

