

Santander ISA Transfer – Cashback offer terms and conditions

Get up to £1,000 in cashback when you transfer your ISA to a Santander Stocks and Shares ISA.

What are the details of the cashback offer and who's eligible?

You'll get between £50 and £1,000 in cashback when you transfer at least £5,000 from an existing ISA into the Santander Stocks and Shares ISA during the offer period. The offer period is between **1 October 2024** and **1 December 2024**.

The cashback amounts are as follows depending on the value transferred and invested during the offer period:

Transfer amount	Cashback amount
£5,000 - £9,999	£50
£10,000 - £24,999	£100
£25,000 - £49,999	£250
£50,000 - £74,999	£350
£75,000 - £99,999	£500
£100,000+	£1,000

You'll be eligible for the cashback offer if you are 18 years or older and a UK resident. The offer is open to both new and existing Santander customers with an Investment Hub account.

The cashback won't be paid on transfers invested during the offer period which are later cancelled or if any withdrawals are made before the cashback payment date.

You can transfer one or more existing ISAs from elsewhere into the Santander Stocks and Shares ISA.

There are lots of ways to invest an ISA transfer:

- On the Santander Investment Hub, making your own investment decisions.
- Through our Santander Financial Planning Service. You can get advice from one of our Financial Planning Managers or Private Bankers.
- By calling our Investment Centre helpline on **0800 328 1328**.

Santander's Investment Hub is our online service that lets you make your own investment decisions. To find out, visit santander.co.uk/personal/savings-and-investments/investments

Santander's Financial Planning Service has eligibility criteria. Please check you qualify before you use it. You can find out if you're eligible for our Financial Planning Service by visiting your branch or santander.co.uk/personal/savings-and-investments/investments/get-advice-on-investing

One cashback payment will be made per Investment Hub Stocks and Shares ISA account.

When will I receive my cashback?

If you've met all the eligibility criteria above, we'll pay the cashback due to you on or before **1 May 2025**. Please note, the transfer of any ISA(s) must be started before the end of the offer period and completed by 31 March 2025 for the cashback to be paid.

How will I receive my cashback?

Your cashback will be paid into your Cash Only Account on the Investment Hub. You can transfer it to an account in your name once it's been paid. The cashback payment will be shown on your next Investment Hub statement as 'Investment cashback'.

When won't I be eligible for the cashback?

Cashback won't be paid for:

- Any transfers made during the offer period which are later transferred out, cancelled, or withdrawn before the cashback is paid.
- New contributions to your Stocks and Shares ISA during the offer period. Only ISA transfers are eligible.
- Any money held as cash on the Santander Investment Hub.
- Any Stocks and Shares ISA transfers not initiated during the offer period.
- Transfers into a Santander Personal Pension or an Investment Account.

How do I access the cashback when it's paid into the Cash Only Account on the Investment Hub?

Log on to your Investment Hub through Online Banking to set up a bank account to withdraw the money from your account.

Or, you could leave the money in your Cash Only Account to pay your next Platform Service Fee or use towards placing an investment.

What if I don't receive the cashback?

In the unlikely event that you don't receive the cashback by **1 May 2025**, contact our Investment Centre helpline on **0800 328 1328**.

Who is the promoter?

The promoter of this cashback offer is Santander ISA Managers Limited.

What else do I need to know?

We won't issue the cashback if we suspect the terms of the offer have been abused.

We'll reclaim the cashback if we discover or have a reasonable suspicion that the terms of the offer were being abused.

This offer depends on availability and other factors, such as market conditions and the regulatory environment. In exceptional circumstances, we can change or withdraw this offer at any time, without giving you notice. This offer may be used with another concurrent Investment Hub cashback offer if the eligibility criteria for both offers have been met.

Terms and Conditions, restrictions and exclusions apply to our investment products. For full details, please refer to the Santander Investment Hub Key Features Document and Terms and Conditions. For investment queries call **0800 328 1328**.

Governing law and jurisdiction

This offer and any dispute or claim arising out of, or in connection with, it or its subject matter or formation shall be governed by and construed in accordance with the law of Scotland.

You and we irrevocably agree that the courts of Scotland shall have non-exclusive jurisdiction to settle any dispute or claim arising out of or in connection with this offer or its subject matter or formation.

As with all investments your capital is at risk and you may get back less than you invest. Investments should be held for the medium to long term (5+ years).