

Invest £5,000 or more this Black Friday and get your investment managed free for six months

1. Capitalised words or phrases used but not defined in these terms have the meaning given to them in the Moneyfarm Client Agreement & Terms and Conditions for Business (the “Terms”), and references to the Terms below shall be construed accordingly.
2. Except as may be varied below in relation to the ‘six months free’ offer, the Terms apply to this offer.
3. Subject to the terms set out below, the ‘six months free’ offer enables Moneyfarm Account holders to receive portfolios managed free of charge for six months.

Conditions of Eligibility

4. In order to qualify for the ‘six months free’, the following conditions must be met:
 - (a) you must hold a live and funded Moneyfarm Account, an account can be a General Investment Account, an ISA or a Pension;
 - (b) your account must have the relevant promotion code entered at the time of portfolio creation, it is usually the responsibility of the user to ensure this is added when terms and conditions are accepted. In the event that terms and conditions have already been accepted, a Moneyfarm Investment Consultant may add the promotion code.
 - (c) you must set-up a portfolio within your Moneyfarm account by 23:59 on 30 November 2018. Any portfolios set-up after the 30 November 2018 will not be eligible for the offer.
 - d) The Moneyfarm Portfolio must be funded with at least £5,000 in order for the code to be activated on the account by 23:59 30 November 2018, if after this time the Account value is below £5,000 we reserve the right to remove the code.
5. The offer includes the transfer of existing pensions or ISAs into a Moneyfarm Pension, or Stocks & Shares ISA. The transfer must be in process by 23:59 30 November 2018, otherwise we reserve the right to remove the code. The promotion offer starts once we receive our transfer request form. The relevant tax rules will apply.
6. Moneyfarm reserves the right to decline to open a portfolio (as applicable) at its sole discretion and without giving any reason for doing so.

7. If the conditions set out in paragraph 5 above are met, the six months of free management fees will commence from the date the portfolio is created. The offer will be applied across all Moneyfarm portfolios within an account; including Pensions, ISAs and General investments.

General

8. Moneyfarm employees, contractors, sub-contractors and members of their households are not eligible to participate in this offer.

9. Moneyfarm reserves the right to amend, withdraw or restrict this offer at any time without notice.

10. These terms (including non-contractual disputes or claims) are subject to English law and the exclusive jurisdiction of the English courts.

11. Before claiming this offer you should make sure that the Moneyfarm portfolio meets your needs and objectives.

As with all investing, your capital is at risk. The value of your investment can fall as well as rise and you may get back less than you invest. Eligibility to invest in a pension or ISA depends upon your circumstances. Tax rules may change in the future. If you need help with pensions or ISAs, seek independent financial advice. Note that you can't withdraw money from a personal pension until you're 55.