



CITRUS  
FINANCIAL

# Good Advice Worth Sharing

## ► Terms & Conditions

The following terms and conditions apply to Citrus Financial's client introduction scheme. They set out who is eligible to take part, how introductions are recognised, and when a thank-you gift may be provided. Please read them carefully before making an introduction. If you have any questions about the scheme or how it works, our team will be happy to help.

# Client Introduction

## Terms and Conditions

- ▶ To be eligible for this offer, the referrer must be aged 18 or over and an existing client of Citrus Financial Management Ltd at the time the introduction is made.
- ▶ The individual being introduced ("the referred person") must not be an existing client of Citrus Financial Management Ltd.
- ▶ The referred person must complete an initial advice meeting with a financial adviser or mortgage adviser at Citrus Financial Management Ltd.
- ▶ The referrer will only become eligible for the reward once the referred person has completed their initial advice meeting and all other terms and conditions have been met.
- ▶ The referrer consents to the referred person providing Citrus Financial Management Ltd with the referrer's name and email address, for the purpose of administering this offer.
- ▶ Where the referrer qualifies for the offer, a £50 Prezee eGift card will be sent to the referrer by email within 60 calendar days of the initial advice meeting being completed.
- ▶ There is no cash alternative to the £50 Prezee eGift card.
- ▶ The referrer may receive a maximum of one Prezee eGift card per referred person.
- ▶ The maximum number of Prezee eGift cards a referrer may receive in any calendar year is 10 (total value £500). There is no limit to the number of people a referrer may introduce, but rewards will only be paid for the first 10 qualifying introductions in each calendar year.
- ▶ A reward will only be paid where the referred person provides the referrer's details to Citrus Financial Management Ltd. Where more than one person claims to have made the introduction, the reward will be paid to the first referrer whose details are provided to us.
- ▶ Citrus Financial Management Ltd reserves the right to withdraw this offer at any time. If withdrawn, details of the closing date will be published on our website.
- ▶ Following withdrawal of the offer, no new introductions will qualify unless the referred person has completed their initial advice meeting on or before the published closing date.
- ▶ Citrus Financial Management Ltd reserves the right to amend, suspend or terminate this offer at any time, for any reason, without prior notice.