



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 over 18, be a UK resident and existing client of Citrus Financial Management Ltd. It is the Referrer's responsibility to ensure that they meet the eligibility before referring a friend(s).
- ▶ The Referred Friend must complete an initial advice meeting with either a Citrus Financial Management Ltd financial adviser or mortgage adviser, before the Referrer becomes eligible for the reward.
- ▶ The Referrer consents to their Referred Friend providing Citrus Financial Management Ltd with their full name and email address on their behalf to enable us to make the reward payment should they qualify.
- ▶ It is the responsibility of the person that's been referred to clearly inform the firm of the referrers name etc. (The referrer cannot pass on the referred client's information to the firm, nor can the firm call the referred).
- ▶ The Referred Friend must not be an existing client of Citrus Financial Management Ltd
- ▶ The Referrer will only qualify for the payment if all these terms and conditions are met.
- ▶ If the Referrer meets these terms and conditions and qualifies for the offer, Citrus Financial will send a £50 Prezee eGift card to the Referrer via email within 60 calendar days of the initial advice meeting being attended by the Referred Friend.
- ▶ There is no cash alternative to the £50 Prezee eGift Card offered.
- ▶ The Refer will be limited to receiving one Prezee eGift card per Referred Friend.
- ▶ The maximum number of Prezee eGift cards we will award a Referer in one calendar year is 10 (value £500). We will only pay the Referrer for the first 10 eligible recommendations they make, however there is no limit to the number of friends a Referrer can refer.
- ▶ The Referrer will only receive the Prezee eGift card where the Referred Friend has provided their details to Citrus Financial Management Ltd. If someone else refers that friend, we will pay the first Referrer whose details are provided to us.
- ▶ Citrus Financial Management Ltd can withdraw this offer at any time and should we choose to do so, we will update our website with the closing date of the offer.
- ▶ From withdrawal the Referrer will not be eligible to qualify for this offer unless the Referred Friend's initial advice meeting was completed on or before the closing date of the offer.
- ▶ If we withdraw the offer, the Referred Friend will have 14 days from the date the offer is withdrawn to attend an initial advice meeting.
- ▶ We may change, suspend or terminate this offer at any time, for any reason, without notice.