

Jade and Premier Financial Planning Offer (Channel Islands and Isle of Man residents)

Terms and Conditions

Premier Financial Planning Offer

These Offer Terms and Conditions (the "Offer Terms") are an agreement between you and us. They apply if you implement recommendations no later than 14 April 2021, in products that are recommended to you by us, between 7 January 2021 and 31 March 2021 (the "Offer Period"). These Offer Terms apply in addition to and should be read together with the HSBC Financial Advice Terms of Business for Channel Islands and Isle of Man residents. In the event of any conflict between these Offer Terms and the HSBC Financial Advice Terms of Business for Channel Islands and Isle of Man residents, these Offer Terms will apply.

In these Offer Terms "we", "us" or "our" means HSBC Bank plc, Jersey, Guernsey and Isle of Man branches.

Eligibility criteria for this Offer

1. To be eligible for the Offer described below, all of the following requirements must be met:
 - a. you (or where you are entering into an Advice Agreement jointly with others, both of you) must hold and retain an eligible bank account with us, to receive our advice service and to pay applicable fees from;
 - b. you must not have implemented any investment recommendations with us on or after 7 January 2020 (which is up to 12 months before the Offer Period starts);
 - c. you must receive investment advice, as set out in the HSBC Financial Advice Terms of Business for Channel Islands and Isle of Man residents, during the Offer Period;
 - d. your initial discussion with a financial adviser, to assess your needs and investment objectives, must be after 7 January 2021;
 - e. the investment advice we set out in your Financial Planning Report must be for less than £3m and must be issued to you in person, by post or email; and
 - f. your completed application documents must be received by us, by 14 April 2021.

The Offer

2. If you meet the eligibility criteria, we will reduce the standard 'Report and Implementation Fee', set out in our HSBC Financial Advice Services and Costs Document, from 2.75% of assets implemented, to 2% of assets implemented (for lump sums only), and/or a £350 fee for regular contributions, subject to a £5,000 maximum regular contribution.
3. Other standard charges, as set out in our HSBC Financial Advice Services and Costs Document, still apply. By 'other', we mean the Report Only Fee (applicable to both lump sum and/or regular contributions), the Minimum and Maximum charges (applicable to lump sums only).

The Offer Period

4. The Offer Period is between 7 January 2021 and 31 March 2021 (inclusive). Any Financial Planning reports issued after this date will not qualify for the Offer.
5. Any completed application documents received by us after 14 April 2021, which is 14 days after the Offer Period ends, will not qualify for the Offer.
6. We may withdraw this Offer before the end of the Offer Period without notice. If we do withdraw the Offer, we will put a notice on our website/in our branches. Any applications received after we have withdrawn the Offer will not qualify for this Offer.

General Terms

7. This Offer is not transferable.
8. We may refuse any application for a product or service.
9. We will provide you with the HSBC Financial Advice Terms of Business for Channel Islands and Isle of Man residents before providing any financial advice. These Terms of Business set out the basis on which we will provide advice services to you in Jersey, Guernsey or the Isle of Man. They should be read together with 'Your Advice Agreement' letter (including, where relevant, any Appendix to that letter) and our Services and Costs Document.
10. Standard minimum amounts for investing through our advice service apply. £25,000/US\$35,000/€25,000 lump sum and £250/US\$350/€250 per month.

Please note: To maintain your HSBC investment account after you have benefited from this Offer, you will need to continue to comply with the HSBC Financial Advice Terms of Business for Channel Islands and Isle of Man residents.

Issued by HSBC Bank plc.

HSBC Bank plc, registered in England and Wales number 14259. Registered office 8 Canada Square, London, E14 5HQ. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. HSBC Bank plc, Jersey Branch is regulated by the Jersey Financial Services Commission for Banking, General Insurance Mediation, Fund Services and Investment Business. HSBC Bank plc, Guernsey Branch is licensed by the Guernsey Financial Services Commission for Banking, Insurance Intermediary and Investment Business. In the Isle of Man HSBC Bank plc is licensed by the Isle of Man Financial Services Authority. 201112/MA/454

Financial Planning Offer for Jade customers

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 - e. the investment advice we set out in your Financial Planning Report must be for less than £3m and must be issued to you in person, by post or email; and
 - f. your completed application documents must be received by us, by 14 April 2021.

The Offer

2. If you meet the eligibility criteria, we will reduce the standard 'Report and Implementation Fee', set out in our HSBC Financial Advice Services and Costs Document, from 2.25% of assets implemented, to 2% of assets implemented (for lump sums only), and/or a £350 fee for regular contributions, subject to a £5,000 maximum regular contribution.
3. Other standard charges, as set out in our HSBC Financial Advice Services and Costs Document, still apply. By 'other', we mean the Report Only Fee (applicable to both lump sum and/or regular contributions), the Minimum and Maximum charges (applicable to lump sums only).

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