

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

Terms and Conditions

These Offer Terms and Conditions (the "Offer Terms") are an agreement between you and us. They apply if you implement recommendations no later than 30 April 2020, in products that are recommended to you by us, between 6 January 2020 and 31 March 2020 (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 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;
 - c. your initial discussion with a financial adviser, to assess your needs and investment objectives, must be after 6 January 2020;
 - d. 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
 - e. your completed application documents must be received by us, by 30 April 2020.

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.
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, Minimum and Maximum charges, and costs for regular contributions.

The Offer Period

4. The Offer Period is between 6 January 2020 and 31 March 2020 (inclusive). Any Financial Planning reports issued after this date will not qualify for the Offer.
5. Any completed application documents received by us after 30 April 2020, which is 1 month 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 the Channel Islands 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.

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.

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