

REEVES

– ADVOCATES –

TERMS & CONDITIONS

REEVES ADVOCATES TERMS AND CONDITIONS

1. How The Program Works

Reeves existing and new clients can refer their friends, family or colleagues* to a firm within the Reeves Group (Reeves Independent Limited or Reeves Financial Services Limited) for a free review, with benefits for both the referring party and referral.

*Spouse Referral Terms – Important Notice

To ensure complete transparency, please note:

- Spouse referrals do not qualify for cash rewards therefore are NOT eligible for the £100 referring party gift card or the £25 referral reward.
- If the referee is an existing client, a qualified spouse referral will still count as one entry into the luxury prize draw.
- This policy is in place to ensure fairness across the referral program.

2. Definition of Referral

Reeves consider a referral to have taken place when a referred individual returns at least one Letter of Authority to Reeves. Each individual, if assessed as suitable by Reeves, will be counted as one referral.

Reeves has the right to decide on an individual basis which referrals qualify as suitable. A guide to a 'suitable individual' is: Aged 50 years old or above, has worked in the private sector, has private-sector pensions and preferably has £30,000 in investible funds.

3. Rewards And Offers

For each eligible referral:

- The referring party will receive a £100 gift card.
- The referred individual will receive a £25 gift card.

Gift cards are distributed via Tremendous and can be redeemed at a variety of retailers.

If the referring party is an existing client (i.e., they have completed the onboarding process), they will also receive one entry into the luxury prize draw for every qualified referral.

The prize draw is conducted virtually via Zoom, where eight winners will be randomly selected using a prize wheel. The prizes are:

- First Prize: £5,000 holiday
- Second Prize: £3,000 holiday
- Third Prize: £2,000 holiday
- Fourth to Eighth Prizes: Case of luxury wine or luxury hamper

Prize Draw Attendance Requirement

Attendance at the prize draw is mandatory to claim a prize. If you cannot attend, you may designate someone to attend on your behalf. Presence is confirmed by joining and remaining in the Zoom event. If neither you nor your representative are present, the prize will be redrawn.

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4. Issuing Of Rewards And Offers

4.1 You will be sent the Tremendous Gift Card 14 days after the referral is deemed suitable. The gift card will be sent via email.

4.2 From October 2024, holiday winners will receive a cash payment corresponding to the amount they have won within 14 working days of the draw being held. Wine/Hamper winners will receive their prize within 7 working days of the draw being held.

4.3 For previous voucher winners - all vouchers issued before 31 May 2024 have no time limit for when the client can redeem the voucher. For all vouchers issued after 1 June 2024 the client has 12 months to redeem the voucher. After this, the voucher will be invalid.

5. General

5.1. These Referral Terms are published by Reeves Group Limited (“we”, “us” and “our”). These Terms form a binding agreement for both Referring Users (“you” or “your(s)”) and people who receive our referral invitation.

5.2. This Referral Program permits you to invite your contacts to participate in our Referral Program.

5.3. You may only invite personal friends, family members, acquaintances, and colleagues to this Referral Program. Spouse Referrals may participate in the program but are not eligible for any vouchers.

6. Completed Referrals and Limit

6.1. A Completed Referral is when a Referring User refers this Program to one of its contacts. Subsequently, that contact will either sign up, make a purchase or complete whatever action is determined as a referral above - which is not cancelled or disputed in accordance with Subsection 3.

6.2. A limit to the number of referrals by Referring Users may apply. Or we may specify a maximum number of Completed Referrals who are eligible for the benefits of this Program.

6.3. All referred people must be new and first-time Users. Existing Users cannot participate in and benefit from the Referral Program.

6.4. You represent all personal information is 100% correct and up to date. We may monitor your use of the Referral Program or request your ID to verify your identity before issuing rewards.

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7. Restrictions

- 7.1.** By participating in this Referral Program, we may restrict you from any other promotion, program, discount, or vouchers.
- 7.2.** You understand and agree that you must not use referral methods that are bothersome to the recipients. Moreover, your participation in the Referral Program must not violate the applicable law, including but not limited to anti-spam legislation, which is the mass distribution of unsolicited messages.
- 7.3.** You must not publish our Referral Program on any sites or platforms that house any Adult Content, Alcohol, Tobacco, Gambling, Games and Online Casinos, Political Content, and any form of illegal activities.
- 7.4.** You must not at any time, invite or refer people who are unknown to you.
- 7.5.** You must only use our Referral Program for personal use and refrain from its use for commercial purposes.

8. Term and Termination

- 8.1.** This Referral Program will run until otherwise announced. We may, in our sole discretion, notify Users that the Referral Program has ended with immediate effect.
- 8.2.** Any referral made before the end of the Referral Program can still participate. However we may exclude referrals in our sole discretion made after its termination date.
- 8.3.** We may terminate this Referral Program at any time, including your participation or the availability of its benefits.

9. Exclusive Relationship

- 9.1.** You understand and agree that you are only the User of our services and/or products, and refrain from implying any other affiliation or legal relationship with us.
- 9.2.** You understand and agree that you are never authorized to legally bind our company.
- 9.3.** You must never create any materials that contain our branding, trademark, or (part of) our corporate identity.
- 9.4.** By participating in the Referral Program you must not represent yourself as a duplicate, agent or intermediary of our company

10. Privacy and Information

- 10.1.** You undertake to respect the privacy rights of the people you invite to our Referral Program and direct to our website.
- 10.2.** When referring other people, you must always inform them about the applicable terms and conditions and privacy policy. You must do so before they participate in the Referral Program, and leave their personal information.

11. Amendments

We may amend the terms and conditions of our Referral Program. We may offer and/or restrict additional incentives, benefits and programs. As a result, additional terms may apply. You agree that you are aware of those amended and additional terms.

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12. Violations and Termination

12.1. In case we suspect any violations of these terms or otherwise tampering with, fraud or unreasonable use of our Referral Program, we may in our sole discretion cancel the distribution of any discount, benefit or payout.

12.2. If you are a current or former employee, contractor or affiliate of our company, we may restrict your participation in the Referral Program, and we may restrict or cancel your participation with immediate effect.

12.3. You must comply with all applicable laws and regulations, and refrain from violating any third party rights. These rights include any copyright, trademark or other proprietary rights.

13. Disclaimer and Indemnification

13.1. We offer our Referral Program and its benefits only on an “as is” and “as available” basis. We may remove, change and update the Referral Program at our sole discretion. We will never make any promises or guarantees about the content and information of our Referral Program. We disclaim our responsibility for any information that is incorrect or has errors.

13.2. Our Referral Program is based on our best efforts. You acknowledge and agree that we can never guarantee any benefit or result from participating in the Referral Program.

13.3. You will defend, indemnify and hold Reeves Group Limited harmless from and against all claims, damages, liabilities, losses, expenses and costs (including reasonable attorneys fees) arising out of your participation in the Referral Program.

14. No Correspondence, Disputes And Refunds

With regards to the distribution of discounts, vouchers, incentives, prizes, awards or other benefits, no correspondence will be entered into. Moreover, we shall never respond to any complaint or accept any dispute about the Referral Program, and the abovementioned benefits. are provided “as is” and we never refund or exchange such benefits.

15. Applicable Law

The law of our residence shall apply and the court in that country is competent to hear any claim that may arise out of these terms.

*Please note that by participating in this referral program, you will only have a legal relationship with Reeves Group. You represent that you have read, understood and agree to be bound by Reeves Group’s General Terms and Conditions and Privacy Policy. You also agree that by participating in this campaign your tracking metrics will become public data, this means that anyone with access to your email address will be able to see how many referrals you have generated.

The Reeves Advocate Scheme is run by Reeves Group Holdings (Companies House Number: 12337395). Reeves Independent Limited and Reeves Financial Services Limited are part of the Reeves Group. Reeves Independent Limited (Company Reg No: 11751772) is Authorised and Regulated by the Financial Conduct Authority (FCA register no. 839943). Reeves Financial Services Limited (Company Reg No: 03586020) is Authorised and Regulated by the Financial Conduct Authority (FCA register no. 187607).