



HSBC Expat - Investment Cash Back Offer Terms and Conditions

1. These terms and conditions (the Terms) govern the HSBC Investment Cash Back (the Cash Back).
2. Under the Cash Back, subject to the conditions set out in the Terms, you'll receive 0.50% of the lump sum invested, up to the investment value of £499,999 (or currency equivalent), after receiving financial advice through our advisory investment service. For the avoidance of doubt, our Execution Only and Execution Only – Guided investment service options do not provide financial advice and are not eligible for the Cash Back.
3. In order to be eligible for the Cash Back you must be an existing customer of HSBC Expat, you will need to receive personalised, regulated advice which formulates a recommendation report and advises which product to invest in, and you must successfully complete your investment within the period 23 September 2021 to 31 December 2021.
4. To be eligible for the Cash Back you must:
 - 4.1. Be an existing customer of HSBC Expat.
 - 4.2. Meet the eligibility criteria to invest and successfully complete the investment of a lump sum up to the maximum of £499,999 (or currency equivalent) following advice from a wealth adviser. The implementation of a regular investment plan will not be eligible for the Cash Back. Eligibility to invest: GBP 25,000 / USD 35,000 / EUR 25,000 or more as a lump sum.
 - 4.3. Implement your investment advice into a wealth solution at a fee of 3%.
5. Subject to you complying with these Terms and meeting all of the Cash Back eligibility criteria, HSBC will make a payment of 0.50% of the invested amount, up to a maximum of £499,999 (or currency equivalent), to you within 90 days of the date of your investment. The Cash Back payment will be made into the same HSBC account that you funded the initial investment with, where appropriate. In the event that this is not available, the Cash Back will be paid into your HSBC current account in the first instance, or your savings account, if the current account is not available.
6. No more than one payment will be made to you under the Cash Back and you will not be eligible for any further Cash Back payments for any additional investments. It is not possible to seek investment advice on behalf of other persons and claim the Cash Back.
7. We reserve the right to withhold or revoke the Cash Back payment including where you withdraw all or some of the initial investment within 12 months of the investment being made, or where there has been any breach of the Terms.
8. All eligible customers will automatically be opted in to the Cash Back when investing through the advisory channel. You can opt out of the Cash Back by sending an opt out request to your Wealth adviser.
9. We reserve the right to withdraw this offer at any time. The Cash Back will run from 23 September 2021 to 31 December 2021.

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