

Share Investing Zero Moneyfarm Fees initiative 2023

Terms and conditions

1. Any capitalised terms used, but not defined, in these terms (the “Terms”) have the meaning given to them in the Moneyfarm Client Agreement & Terms and Conditions for Business (the “Terms of Business”) and reference to the Terms of Business below shall be construed accordingly.
2. For the avoidance of doubt, the Offer is available only from 01/09/2023 to 31/10/2023 (the “Offer Period”).
3. The Offer consists in the removal of all Share Investing fees (i.e. trade fee, custody fee, conversion rate fee) for all the transactions made on Share Investing during the set time period.
4. You will still be subject to the relevant security fee (e.g. management fees of the ETFs and stamp duty) and impact of market spread as this is not charged by Moneyfarm.
5. At the end of the set time period, the fees will automatically return to the usual conditions as stated in the relevant T&Cs, i.e.: £3.95 trade fee on each transaction, 0.35% custody fee (custody fee applies only to ISA accounts).
6. The Offer is open to all Moneyfarm clients who are tax residents of Great Britain and Northern Ireland.
7. The Offer should not form the basis of any decision to invest.

Conditions of Eligibility

All clients (new and existing) are eligible to participate in the “Share Investing zero fees” initiative during the set time period (00:01 BST, September 1st to 23:59 BST, October 31st).

General

8. Moneyfarm reserves the right to amend, withdraw or restrict this Offer at any time and at its sole discretion upon 3 days notification.
9. This Term (including non-contractual disputes or claims) is subject to English law and the exclusive jurisdiction of the English courts.
10. As with all investing, your capital is at risk. The value of your investment can fall as well as rise and you may get back less than you invest. Eligibility to invest in an ISA or general investment account depends upon your circumstances. Tax treatment depends on your individual circumstances and may be subject to change in the future. If you are unsure, please seek independent financial advice.

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By making an investment, your capital is at risk. The value of your Moneyfarm investment depends on market fluctuations outside of our control and you may get back less than you invest. Past performance is no indicator of future performance.

11. Moneyfarm will not be liable to you in relation to the Offer, including for any losses arising as a result of the use of the Offer. We do not accept responsibility for any loss, damages or costs you may incur as a result of any cause beyond our reasonable control.

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