

EXCLUSIVE OFFER



## REFER A FRIEND

Kindness knows no limits

  
**RICHMOND HOUSE**  
WEALTH MANAGEMENT

# REFER A FRIEND FORM

To take advantage of our 'Refer a friend' offer, simply complete this form and return to us by email at [info@richmondhousewm.co.uk](mailto:info@richmondhousewm.co.uk) or by post. We'll take it from there.

After a new client account is set up, we will send a £100 Marks & Spencer gift card to the person giving the referral as a thank you and £50 to the person being referred as a welcome. And, you can refer as many people as you like. There are no limits.

## Existing Client Details

Full Name |

Address |

Postcode |

Phone Number |

Email |

## Referral Client Details

Full Name |

Address |

Postcode |

Phone Number |

Email |

## Terms & Conditions

Promotion in effect from 1st December 2020 to 28th February 2021.


You will qualify for a £100 Marks & Spencer gift card if you recommend someone during the promotional period who isn't already a Richmond House Wealth Management client and they subsequently become a client. Anyone referred to Richmond House Wealth Management that becomes a client and agrees to pay advisory fees will also be eligible for a £50 Marks & Spencer gift card. Gift cards will be provided within 60 days of the new client agreement being in place. This must be for an individual and not a corporate account. There is no limit to the number of people you can refer. There is no reason known to you that would stop you or the person you are referring receiving these gift cards.


## Important Information

I have been referred to Richmond House Wealth Management by the person named as the Existing Client on this form. I know the value of the gift card they will receive and agree that they can receive them. I agree to the use of my personal data by Richmond House Wealth Management in connection with this offer. More information on our privacy policy and how we use your personal data can be found at <https://richmondhousewm.co.uk/private-client-privacy-notice/>.

Please tick the box to acknowledge you have read this important information.

Thank you. We will be in touch shortly.

 0333 241 3350

 [info@richmondhousewm.co.uk](mailto:info@richmondhousewm.co.uk)

 [richmondhousewm.co.uk/](https://richmondhousewm.co.uk/)

**Richmond House**  
Premier House, Argyle Way,  
Stevenage, Hertfordshire  
SG1 2AD

  
**RICHMOND HOUSE**  
WEALTH MANAGEMENT