



BRING IT ALL HOME CAMPAIGN

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EasyEquities is an authorised financial services provider (FSP22588), a licensed over the counter derivatives provider (ODP44) and a registered credit provider (NCRCP12294). To view our complaints policy, conflict of interest policy and full disclosure required in terms of the Financial Advisory and Intermediary Services Act, 2002 please go to www.easyequities.co.za.

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1. INTRODUCTION

- 1.1 EasyEquities is running a promotional campaign in terms of which if you transfer your existing investment portfolio (including a deposit of crypto assets) with an external provider satisfactory to EasyEquities ("Existing Portfolio") to your EasyEquities ZAR, TFSA, USD, AUD, EUR, GBP or Crypto Account (collectively the "EasyEquities Accounts" and each an "EasyEquities Account"), as the case may be, during the Campaign Period (as defined below), you may qualify to receive an investment bonus of 1% (one percent) of the value of your Existing Portfolio from EasyEquities to the relevant EasyEquities Account (the "Campaign") in accordance with the terms and conditions set out below.
- 1.2 **The Campaign is subject to these terms and conditions and is subject to and must be read together with the relevant EasyEquities Account Terms and Conditions and/or EasyCrypto Terms and Conditions (each referred to hereafter as "EasyEquities Terms and Conditions").**

1.3 **The clauses in these terms and conditions that require your careful consideration are in bold font. You acknowledge that you have read and appreciated the importance of the terms and clauses in bold font.**

1.4 Capitalised terms used but not defined herein will have the same meaning as in the EasyEquities Terms and Conditions.

1.5 **By participating in the Campaign, you agree to be bound by these terms and conditions.**

2. HOW TO QUALIFY FOR THE CAMPAIGN

2.1 In order to qualify for the Campaign, during the Campaign Period, you must:

- (1) have an approved EasyEquities Account;
- (2) have activated the relevant EasyEquities Account which is receiving your Existing Portfolio;
- (3) in respect of transfers of Existing Portfolios excluding crypto assets, you must have submitted a complete and accurate online transfer form found on the EasyEquities [website](#) (you can access the form [here](#)). In addition, you must email the following supporting documents to transfers@easyequities.co.za:
 - (a) a completed transfer application form, for each Existing Portfolio being transferred;
 - (b) a clear dated selfie (no older than 7 days) of yourself holding your ID document next to your face;
- (4) in respect of transfers of Existing Portfolios including crypto assets, you must follow the instructions on the EasyCrypto Platform, the FAQ can be found [here](#);
- (5) you must complete the survey that you will receive via email once your transfer/s is complete and enter your unique code, **BringItAllHome**, in the space provided; and
- (6) meet all the qualifying criteria relevant to each transfer that you are making as set out in these terms and conditions.

2.2 Only EasyEquities Accounts that have been approved for Trading by EasyEquities in accordance with the EasyEquities Terms and Conditions, including without limitation, verification in terms of the Financial Intelligence Centre Act, 2001 ("FICA") will be eligible to participate in the Campaign. This means that your Account must be FICA verified in order for you to qualify for the Campaign.

2.3 Notwithstanding any provision herein, in order to qualify for the Investment Bonus (defined below) the transfer of your Existing Portfolio to the relevant EasyEquities Account which you initiated during the Campaign Period must be successful. Should you cancel or should the transfer of your Existing Portfolio to the relevant EasyEquities Account be unsuccessful, EasyEquities shall be entitled to recoup the Investment Bonus as set out in clause 5.

3. CAMPAIGN PERIOD

3.1 Subject to clause 3.2 below, the Campaign will run from **02 September 2025 to 28 February 2026** ("Campaign Period").

3.2 Notwithstanding clause 3.1, EasyEquities may reduce or extend the Campaign Period in its sole and absolute discretion. You will be notified of same in accordance with clause 6.2

4. **TRANSFER CRITERIA**

4.1 Each person who meets the eligibility requirements set out in clause 2 above, will qualify to receive back 1% (one percent) of the total value of their Existing Portfolio transferred from the transferor provider to their relevant EasyEquities Account as a bonus subject to a maximum of R50 000 (fifty thousand Rand) per client into an EasyEquities Account ("Investment Bonus").

4.2 The Investment Bonus will be calculated and paid to you in accordance with the provisions of clause 5 below.

4.3 Only assets available for Trading on the EasyEquities Platform or EasyCrypto Platform at the time of the transfer submission may be facilitated through a portfolio transfer. If the Existing Portfolio includes assets that are not available on the EasyEquities Platform or EasyCrypto Platform at the time of the transfer submission, a full or partial cash transfer may be facilitated at EasyEquities sole discretion.

4.4 Only transfers from approved external providers who are satisfactory to EasyEquities in its sole and absolute discretion shall be approved.

4.5 The following types of transfers are not eligible for the Campaign: transfers from Satrix, change of beneficial ownership transfers, transfers from another EasyEquities Account, and corporate share scheme transfers. **EasyEquities reserves the right to determine the eligibility of the transfer, the above exclusions are not exhaustive and may be updated at our sole and absolute discretion at any time.**

4.6 Eligibility to participate in the Campaign for one of your EasyEquities Accounts does not guarantee eligibility to participate in the Campaign for your other EasyEquities Accounts. Each EasyEquities Account's eligibility will be determined independently.

4.7 In the case of a transfer of an Existing Portfolio with crypto assets or non-ZAR denominated assets, the transferee must be at least 18 years or older.

4.8 EasyEquities will verify your participation and compliance with these Campaign Terms and Conditions. **If you have not met one or more of the requirements set out herein, EasyEquities at its own discretion reserves the right not to award you the Investment Bonus. In participating in the Campaign you agree to act in good faith.**

5. **INVESTMENT BONUS**

5.1 Notwithstanding any clause to the contrary herein, the value of the Investment Bonus is calculated as 1% (one percent) of the total market value of the transfer received into the relevant EasyEquities Account from your transferor provider.

5.2 The total market value of the transfer received shall be determined by EasyEquities in its sole and absolute discretion (acting reasonably) based on the prevailing market price (as verified by Bloomberg or similar sources), on the date of receipt into your EasyEquities Account. If the market price as determined by EasyEquities was the market price at any time on the date of receipt into your EasyEquities Account, this will be considered reasonable.

5.3 **You acknowledge and agree that the market value of your holdings used in the calculation of the Investment Bonus is subject to market fluctuation and that we shall not be liable for any claims or losses arising from market fluctuations.**

5.4 In order to claim/be paid the Investment Bonus, you must complete the survey that you will receive via email once each of your transfers are complete and enter your unique code, **BringItAllHome**, in the space provided. Failure to complete the survey and submit the code will result in forfeiture of the Investment Bonus.

5.5 The Investment Bonus will be paid to you by EasyEquities as follows:

(1) it will be deposited into the relevant EasyEquities Account in accordance with the order in which the transfers are received, by the end of the month following the month of receipt of the transfer into to the relevant EasyEquities Account provided you have completed the survey and entered the unique code described above. However, if the receiving EasyEquities Account is a TFSA, the Investment Bonus will be paid into your ZAR Account. If the R50,000 (fifty thousand Rand) Investment Bonus cap is reached, no further Investment Bonus allocations will be made; and

(2) In the case of an Investment Bonus from a crypto asset transfer, it will be deposited as EC10 into your EasyCrypto Account on the EasyCrypto Platform, by the end of the month following the month of receipt of the transfer into the EasyCrypto Account provided you have completed the survey and entered the unique code described above.

5.6 Each Investment Bonus will be locked up for a period of 5 (five) years ("Lock Up Period") from the date of the allocation to your relevant EasyEquities Account. This means that you will not be able to withdraw the Rand value of the Investment Bonus from the EasyEquities Platform or sell the EC10 Investment Bonus from your EasyCrypto Account as the case may be, for the aforementioned period. **You acknowledge that the Investment Bonus may not be withdrawn or transferred out during the aforementioned Lock Up Period, and you accept the associated risks.**

5.7 **Subject to applicable law, the total Rand value of your total holdings transferred in during the Campaign Period for which you received an Investment Bonus, must remain in your EasyEquities Account/s for a period of 3 (three years) from date of receipt.** During this period, in the event that you withdraw or transfer any assets out of your EasyEquities Account/s and if such action would result in, or occurs at a time when, the net asset value (NAV) across your EasyEquities Account/s is less than the total value of the holdings originally transferred into your EasyEquities Accounts/s for which you received an Investment Bonus, you hereby authorise EasyEquities, at its sole discretion, to recoup the full or partial value of the Investment Bonus without prior notice to you from your EasyEquities Account/s or any other account you hold with EasyEquities from which deductions may lawfully be made. The provisions relating to "Security Interest and Set Off" of the applicable EasyEquities Terms and Conditions will apply in this instance.

5.8 **In addition, if the NAV across your EasyEquities Account/s drops below the total value of the holdings originally transferred into your EasyEquities Account/s, for which you are eligible for the Investment Bonus, due to a withdrawal or transfer out of any assets before the Investment Bonus has been allocated to your EasyEquities Account, you will not be eligible to receive the Investment Bonus.**

5.9 **If the transfer of your Existing Portfolio to EasyEquities is not successful for any reason whatsoever, you will not be allocated the Investment Bonus.**

5.10 **Should you have more than one portfolio transfer in progress concurrently during the Campaign Period, the final portion of the Investment Bonus relating to any individual transfer may, at our discretion, only be paid after all the transfers have been successfully completed.**

6. GENERAL

6.1 Communications in respect of the Campaign, will be sent to you by email. **You are responsible for ensuring the email address which EasyEquities has on record for you is correct and you have not unsubscribed from emails from EasyEquities.** If you cannot be contacted, we reserve the right to withdraw the Investment Bonus from you.

6.2 **We may, at any time and in our sole discretion, amend these terms and conditions.** The amendment will be affected by publishing the new version of these terms and conditions accessible via the link to these terms and conditions in the email communicating this Campaign to you and will apply to the Campaign on the date of publication. **You acknowledge that by continuing to participate in the Campaign you agree to be bound by any new version of these terms and conditions.**

6.3 EasyEquities is not responsible for inaccurate details supplied to any person by any third party who is not a representative or authorised by EasyEquities and connected with the Campaign.

6.4 The Investment Bonus is not transferable.

6.5 **By participating in the Campaign, you acknowledge and agree that:**

(1) **EasyEquities will not be liable for any increases or decreases in the value of your Existing Portfolio transferred to the relevant EasyEquities Account and/or the Investment Bonus;**

(2) **EasyEquities will not be liable for any delays or errors made by the transferor provider with regards to the transfer of your Existing Portfolio to the relevant EasyEquities Account and/or your Investment Bonus;**

- (3) you are aware that you will be liable for the costs, fees or charges that you may incur as a result of transferring your Existing Portfolio to the relevant EasyEquities Account, and you are fully aware that EasyEquities will not be liable for any of these costs, fees or charges;
- (4) you have considered your own personal and financial needs and determined whether this Campaign is appropriate for you, and you are encouraged to seek independent financial advice before making any investment decisions; and
- (5) any information provided by us to you in respect of this Campaign should not be construed as financial advice as defined in terms of FAIS.

6.6 **Notwithstanding anything to the contrary, under no circumstances shall EasyEquities be liable to you for any direct, indirect, incidental, special or consequential damages arising out of or in connection with the Campaign.**

6.7 The above indemnity will not extend to any loss, expense or damage which arises as a result of the wilful misconduct or gross negligence of EasyEquities or any director, employee or officer of EasyEquities.

6.8 **You agree and acknowledge that all investment decisions are your own and made at your own risk and EasyEquities will not be liable for any direct, indirect, incidental, special or consequential losses or damages arising out of or in connection with your investment decisions.**

6.9 You are providing your information to EasyEquities and not to any other party. The information provided will be used in conjunction with the EasyEquities' Privacy Notice.

6.10 **The recipients of the Investment Bonus agree to the use of their name and image in any publicity material and has the right to decline the use of his/her image in our marketing material by notifying us in writing within 24 hours after being notified that they have qualified for the Investment Bonus. Any personal data relating to the recipient or any other entrants will be used solely in accordance with the EasyEquities Privacy Notice and current South African data protection legislation(s).**

6.11 If any clause of these terms and conditions is illegal or unenforceable, that particular clause may be cancelled and the remaining clauses of these terms and conditions will still operate.

6.12 **You acknowledge and agree that the copyrights, trademarks, service marks and all other intellectual property or other rights to any information distributed to or received by you whether sent by us or on our behalf, by any means (including but not limited to by internet electronic communication or mobile phone), together with any advertising media, website or other material connected to EasyEquities and the Campaign, will remain our sole and exclusive property. You will not permit or facilitate, and will take steps to prevent any sale, re-distribution, dissemination, re-publication or re-display of the information referred to in this clause, however received, to any third party.**

6.13 Unless specifically otherwise provided, any number of days prescribed shall be determined by excluding the first and including the last day or, where the last day falls on a day that is not a business day, the next succeeding business day.

6.14 Except to the extent that any provision of these terms and conditions expressly provides otherwise, if the only day or the last day for the exercise of any right, performance of any obligation or taking (or procuring the taking of) any action in terms of any provision of these terms and conditions falls on a day which is not a business day, such right shall be capable of being exercised, or such obligation performed or action taken on the immediately succeeding business day.