\*Referred new clients must open and fund their PurePoint Savings Account in person at a Financial Center on/before August 31, 2018 5pm local time, using the unique offer code they receive in their referral email. Standard account opening requirements, including \$10,000 minimum deposit to open, and timelines apply. Valid email address and Online Banking enrollment is required to open and maintain an account.

Financial Center locations are found in New York, Houston, Dallas, Miami, Tampa and Chicago. See <u>Locations</u> for detailed information.

Bonus will be deposited into the respective PurePoint Savings Accounts. Please allow up to 10 business days from date of new client account funding date for processing. If either savings account is closed, becomes inactive, or is not in good standing at time of processing, the bonus will not be paid to either account. Bonus will be reported on 1099-INT and will be aggregated with other interest during the year for tax reporting purposes.