Refer a Friend – Terms

When a "Referrer" introduces a friend or colleague who becomes a client of Caroola Accountancy ("New Client"), both parties will be eligible to receive a reward, subject to the conditions outlined below.

Package	Referrer Reward	New Client Reward
Lite	£300	50% off monthly fees for 3 months
Accountancy	£300	50% off monthly fees for 3 months
Plus	£300	50% off monthly fees for 3 months
Sole Trader	£50	50% off monthly fees for 3 months
Sole Trader Plus	£50	50% off monthly fees for 3 months
Sole Trader MTD	£50	50% off monthly fees for 3 months

The Reward

The Referrer Reward is paid directly into the Referrer's bank account. An Anti-Money Laundering check may need to be carried out, and bank details may need to be requested and stored securely upon sign-up.

You will only qualify for a Reward once all Eligibility Criteria and Conditions have been fully met – see below

Rewards may be subject to taxes, and the recipient is responsible for declaring these to HMRC where required.

Caroola reserves the right, at its sole discretion, to determine whether a referral meets the qualifying criteria. All decisions are final. To qualify:

- The New Client must complete onboarding and
- The New Client must pay their first monthly fee via Direct Debit.

The reward will be paid to the Referrer within 30 days of all eligibility criteria being met subject to a satisfactory AML check being in place and bank details having been securely provided.

Eligibility Criteria & Conditions

To participate in this promotion:

- New Clients must not have held a client relationship with any Caroola Group company within the previous 24 months.
- Referrals may not be accepted where the Referrer or New Client has any outstanding fees owed to Caroola Group.
- This offer is available only to individuals capable of entering legally binding contracts under English law.
- Participants must be 18 or over.
- Caroola reserves the right to amend, withdraw, or suspend the offer at any time without prior notice.
- This promotion is governed by the laws of England and Wales.
- Caroola may place limits on the number of referrals a single Referrer can earn within a 12-month period without notice.

General Provisions

- Participants must be 18+ and capable of entering legally binding contracts.
- The Referrer must have obtained the New Client's permission to share their details with Caroola Group.
- The scheme cannot be used for self-referrals, referrals between joint shareholders/directors of the same entity, or where a New Client is already engaged in discussions with Caroola.
- Only one Referrer can claim a Reward per New Client (the first referral received will be honoured).
- The offer cannot be used in conjunction with other promotional discounts unless expressly permitted.
- Caroola reserves the right to reject referrals where information is incomplete, incorrect, fraudulent, or submitted in breach of these Terms.
- Any disputes relating to eligibility or reward payments must be raised within 60 days of the referral decision.
- Caroola's decision on all matters relating to the RAF Scheme is final.

Caroola Accountancy Limited
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Registered Office: Apollo House Hallam Way, Whitehills Business Park, Blackpool, England, FY4 5FS (Registered in England and Wales).

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