

New Auto Invest Promotion

Terms and Conditions

1. By participating in SoFi Securities (Hong Kong) Limited ("SoFi HK") New Auto Invest Promotion ("Promotion"), you agree to be bound by the Terms and Conditions of the Promotion and any such variation.
2. This promotion is applicable to all existing and new clients of SoFi HK.
3. By completing the below Tasks and fulfilling the relevant Task Requirements within the specified promotion period, you are entitled to the relevant Rewards ("Rewards") as stated in the below tables.
4. This Promotion runs from 2 June 2025 at 12:00 a.m. (HKT) to 1 August 2025 at 08:00 a.m. (HKT) (Promotion Period).

Task "New Auto Invest"

Task Requirements	Average daily market value of the portfolio over 30 calendar days	Rewards
You are eligible for one Rewards as stated in the right-hand columns for each new Auto Invest Account given that: <u>Option 1</u> <ul style="list-style-type: none"> - Upgrade from existing Auto Invest Account to a New Auto Invest Account during the promotion period; and - Your average daily market value of the portfolio in the new Auto Invest Account is at or above certain tiers over 30 calendar days during the promotion period <u>Option 2</u> <ul style="list-style-type: none"> - Open a new Auto Invest Account during the promotion period; and - Your average daily market value of the portfolio in the new Auto Invest Account is at or above certain tiers over 30 calendar days during the promotion period <p>* The average daily market value of the portfolio in the new Auto Invest Account are calculated based on the 30 calendar days with the highest portfolio market value during the promotion period</p>	At or above US\$100,000	1500 SoFi Points
	At or above US\$50,000	800 SoFi Points
	At or above US\$13,000	200 SoFi Points
	At or above US\$6,500	100 SoFi Points

5. You can only complete Task "New Auto Invest" once for each new Auto Invest Account and you can only enjoy the relevant Rewards once for each new Auto Invest Account.
6. SoFi HK will deposit the Rewards associated with the highest tier you have achieved to your SoFi HK account within 20 business days after the promotion end day. Your account must be active at that time.
7. There are limited quotas for the Rewards and the Rewards are available on a first come first served basis.
8. You are responsible for and are required to pay all fees, charges and taxes associated with the Rewards. SoFi HK shall be deemed to have discharged its obligations once the Rewards has been deposited into your SoFi HK account.
9. This Promotion and Rewards is subjected to availability. SoFi HK reserves the right to replace the Rewards with alternative items without prior notice and at SoFi HK's sole discretion.
10. This Promotion may not be transferred or sold.
11. This Promotion may not be used with other promotional events.
12. All Rewards are non-exchangeable for cash and / or other gifts.
13. SoFi HK reserves the right to terminate this Promotion at any time. Notice of termination may or may not be posted (but SoFi HK is not obliged to do so) to SoFi HK's website or via other means. After the termination, no one can participate in this Promotion and no one holds the right to claim any Rewards from this Promotion from SoFi HK.
14. SoFi HK reserves the right to vary the terms and conditions of this Promotion or to withdraw this Promotion at any time. SoFi HK's decision is final in all matters relating to this Promotion.
15. SoFi Points is a loyalty program provided by SoFi HK. You can refer to the SoFi Points Terms and Conditions in the SoFi Hong Kong mobile application ("App") for more details.
16. In the event of any inconsistency between these Terms and Conditions and any brochure, marketing or promotional material relating to this promotion, these Terms and Conditions will prevail.
17. These terms and conditions are prepared in both English and Chinese versions, in the event of discrepancy between the versions, the English version shall prevail.



Disclaimer

The above information is for reference only and does not constitute and should not be regarded as an offer, solicitation, invitation, investment advice, recommendation to buy, sell or otherwise deal with any investment instrument or product in any jurisdictions. Keep in mind that investing involves risk, and past performance of an asset never guarantees future results or returns. It's important for investors to consider their specific financial needs, goals, and risk profile before making an investment decision. You are encouraged to consult your own independent financial advisors before making any investment decision.