

Alinea Invest, Inc.  
Promotional Offer for one month

**Terms and Conditions**

1. This promotional offer is for the duration of one month from March 3rd, 2022 to April 3rd, 2022. For the time being, we do not expect this to change.
2. To be eligible for the promotion, new users must apply to open an Alinea account on the Alinea App and have the latest version of the app downloaded, complete the Know Your Customer (KYC) questionnaire, link their bank account, and fund the account with at least \$5.
3. An “investing playlist” is defined as a basket of investments made through the “create” feature on the Alinea app. This can be of the user’s choosing.
4. Users who have at least 25 copies on their “investing playlist” created through the Alinea app, will receive a \$100 cash deposit in their Alinea brokerage account. The \$100 reward is applicable only for the first 25 copies. A copy is defined as other investors, not including one’s self, clicking on the copy button.
5. This promotion will be applicable only to new custom playlists created on or after March 3rd, the day this promotion begins.
6. The deposited cash reward from Alinea can be used to acquire any investment through the Alinea App. Depending on the deposit method, funds may take up to 5 business days to settle once the transfer is initiated. Transfer can be initiated up to 10 days after a user has reached 25 copies on their playlist.
7. The deposited money and any potential returns can be withdrawn after 30 calendar days which is DriveWealth’s withdrawal period.
8. This promotion is valid once per Social Security Number used to open an Alinea account. If a client already has an Alinea account, making an initial deposit of any amount in another Alinea account will not grant the client the right to earn another \$100 dollar deposit in their Alinea brokerage account as cash available to invest. This offer is not transferable and cannot be used in conjunction with any other offers.
9. This program is only open to U.S. residents currently living in the U.S., who are at least 18 years of age and hold a valid Social Security Number. Employees, contractors, or persons similarly associated with Alinea-Invest, Inc. or an Alinea affiliate, members of their household and employees of any securities regulatory organization or exchange are not eligible for this program.
10. At its discretion, Alinea Invest, Inc. reserves the right to adjust the incentive program parameters.
11. Alinea Invest, Inc. reserves the right to decline participation of any customers in its incentive

programs.

12. Alinea Invest, Inc. reserves the right to terminate the incentive program at any time without notice.
13. Clients should consult with their tax advisors about the appropriate tax treatment for this offer and any tax implications associated with receipt of a cash bonus before enrolling. For taxable accounts, the value of all Alinea offers received may be reported as Other Income on a Form 1099-MISC where required by applicable rules and regulations. Alinea does not take responsibility for any tax related to this cash reward program.
14. Other restrictions may apply and will be posted on the Alinea App or website prior to effectiveness.
15. For additional questions, contact Alinea support at [info@alinea-invest.com](mailto:info@alinea-invest.com).