

Dunn's House
St Paul's Road
Salisbury
SP2 7BF

Customer Service Centre:
ask@nucleusfinancial.com

nucleusfinancial.com

Exciting news – you're getting a service upgrade.

Product name:
Member number:

I'm pleased to let you know that we've made a multi-million-pound investment in upgrading our service to you. This will deliver an improved investment platform with a new name and brand – Nucleus, that provides:

- A better and more responsive service
- More user-friendly technology

Your next steps

When our new platform is live, we'll automatically upgrade your product(s) to it. What's important for you to do now is:

1. **Read your enclosed Key Changes Summary** for details about how your product and the service we provide will change, and how this will benefit you.
2. **Leave the rest to us:** I'll write to you again to confirm when the changes will take place and what happens next. Rest assured that your investments will remain safely invested throughout the upgrade.

Got a question?

You can find out more at nucleusfinancial.com/upgrade-support

Here you'll find additional helpful information, further key documents that outline your upgraded product, and the **updated terms and conditions** that will apply after the upgrade.

If you'd like a paper copy of these documents, please email ask@nucleusfinancial.com.

I've written to your financial adviser to tell them about these changes so feel free to speak with them if you have questions.

If for any reason you don't want to change to our upgraded service, you have the option to transfer to another provider. If we're unable to complete the transfer of your products before they're upgraded to our new platform, we'll honour the existing terms and conditions when the transfer is completed. I recommend you discuss with your adviser what is best for you.

Thank you for trusting us to help your adviser look after your investments. We look forward to continuing to serve you under our new name, Nucleus.

Yours sincerely



Richard Rowney
CEO

We're here to help...

If you have any questions, we always recommend you speak with your financial adviser.

Alternatively, you can:

- send us a secure message via James Hay Online
- email us at ask@nucleusfinancial.com, or
- call us on 03455 212 414.

We're open Monday to Friday between 8.30am and 5.30pm (excluding bank holidays).

We can't give financial advice, but we can provide information.

"James Hay Partnership" is the trading name of Nucleus Group Services Limited (NGSL) (registered in England, number 02538532); James Hay Services Limited (JHS) (registered in Jersey, number 77318); IPS Pensions Limited (IPS) (registered in England, number 02601833); James Hay Administration Company Limited (JHAC) (registered in England, number 04068398); James Hay Pension Trustees Limited (JHPT) (registered in England, number 01435887); James Hay Wrap Managers Limited (JHWM) (registered in England, number 04773695); James Hay Wrap Nominee Company Limited (JHWNC) (registered in England, number 07259308); PAL Trustees Limited (PAL) (registered in England, number 01666419); Sarum Trustees Limited (SarumTL) (registered in England, number 01003681); The IPS Partnership Limited (IPSP) (registered in England, number 01458445); Union Pension Trustees Limited (UPT) (registered in England, number 02634371). NGSL, IPS, JHAC, JHPT, JHWM, JHWNC, PAL, SarumTL, IPSP, UPT have their registered office at Dunn's House, St Paul's Road, Salisbury, SP2 7BF. JHS has its registered office at Aztec Group House, IFC6, The Esplanade, St Helier, Jersey, JE4 0QH. JHAC, JHWM, IPS, IPSP, are authorised and regulated by the Financial Conduct Authority. NGSL, IPS, IPSP, PAL, UPT, JHWM, JHPT, JHAC, SarumTL and JHS are members of a VAT group with VAT registration number 514 0358 80. All companies are wholly owned subsidiaries of Nucleus Financial Platforms Limited (registered in England, number 06033126) whose registered office is at Dunn's House, St. Pauls Road, Salisbury, Wiltshire, SP2 7BF, and are members of the Nucleus Group. Further details of the Nucleus Group can be found at nucleusfinancial.com (5/24)