

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

Customer Service Centre:
ask@nucleusfinancial.com

nucleusfinancial.com

Your James Hay upgrade is coming soon

Product:

Member number:

I wrote to you in the summer to share the news that we're going to be closing the James Hay Wrap and upgrading you to our new Nucleus Modular iPlan, on our new platform. We're making good progress, and I'll soon be able to confirm when the upgrade will take place.

The new Nucleus Platform uses next-generation technology, so you'll get a:



More responsive service

Efficient support from us.



Wider range of products

More choice.



Simpler approach to charging

Easier to understand the charges you pay.



More intuitive technology

Easier to use.

What you can expect in the months ahead

- We'll write to you again to confirm the upgrade date, anything you need to know and what happens after it takes place.
- In the weeks leading up to the upgrade, some aspects of our normal service will be different. These changes will be temporary and are necessary to ensure it's smooth and doesn't cause you any disadvantage.
 - **The attached flyer outlines the processes affected** and when they need to be completed ahead of the upgrade.
 - **Our next letter will confirm the upgrade date and timeline** for each process deadline, but to help you in the meantime, I can confirm that these process restrictions will not start before 24 November 2024.
 - **If you and your adviser wish to perform some or all of the restricted processes** in the months between now and the upgrade, we'd appreciate your help in planning your activity accordingly. Of course, we'll let you know the exact upgrade date and restriction deadlines as soon as we can.
- We'll then automatically upgrade your product(s) from James Hay Online to the Nucleus Platform. Your investments will remain secure and safe while we complete the upgrade, and there's nothing you need to do.

What you could do now

1. **Read the enclosed Changes to our standard service flyer.**
2. **Login to James Hay Online:** If your adviser has arranged for you to use our website to access your account, it's worth logging into James Hay Online before the upgrade to check your login details work as expected – particularly if you've not used it recently. This will help ensure easy access the first time you use the Nucleus Platform, using your current login details. You can access James Hay Online now at jameshay.co.uk/portal.
3. **Speak with your adviser:** The changes to our technology, products, service and charges mean that we'll also be changing our terms and conditions.

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

Want to know more?

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

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

You'll also find a copy of our previous letter and the important documents enclosed with it.

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

I hope you find this update helpful. I'll be in contact again soon.

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.

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