

Suite 202
Warner House
123 Castle Street
Salisbury
SP1 3TB

Customer Service Centre:
03455 212 414
ask@nucleusfinancial.com

nucleusfinancial.com

Updated information about your James Hay upgrade

Dear [Name]

Product name: [Product name]

Member number: [Member name]

We're writing to provide you with information about your upcoming service upgrade to the Nucleus Platform.

Since I wrote to you in August 2024, we've noticed that you no longer work with a financial adviser. As your previous adviser had agreed specific terms with us, your charges schedule will now be different to the one we previously sent you.

Please find enclosed your updated Charges Schedule, which shows the fees that will apply to your products following the service upgrade.

Your next steps:

- Review the enclosed Charges Schedule carefully
- Speak with a financial adviser if you have any questions about the charges
- Keep this updated information for your records

If you want to make any changes to your investments before the upgrade, or don't want to change to our upgraded service, we recommend you consider discussing with an adviser to understand what's right for you.

You still have the right to transfer your investments to another provider if you wish. 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 until the transfer is completed.

We'll write to you again soon to update you on the upgrade. In the meantime, you can find out more at nucleusfinancial.com/upgrade-support.

I look forward to sharing the new Nucleus Platform with you.

Yours sincerely



Richard Rowney
CEO

We're here to help...

Should you have any questions, we always recommend you speak with a financial adviser.

If you'd like to speak with a financial adviser but aren't sure where to start, the government-backed financial guidance service MoneyHelper have made it easy. Simply visit www.moneyhelper.org.uk/en/getting-help-and-advice and go to the Financial advice section.

Alternatively, you can:

- use the 'Platform upgrade support chat' feature at nucleusfinancial.com/upgrade-support
- 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.