

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:** James Hay Private Client SIPP  
**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.

We're also simplifying our range of products so are closing the James Hay Private Client SIPP and upgrading you to the **new Nucleus Modular iPlan**.

You'll still be able to access all the same products and investments as before, but you'll also benefit from:

- A wider range of products, so your adviser has more choice to support you
- Simplified pricing, to make it easier to understand the charges you pay
- A better and more responsive service, and 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 why this is good news.
2. **Understand your enclosed New Charges Schedule** which explains how our simplified, more transparent pricing will work for the Nucleus Platform.
3. **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](https://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](mailto: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](mailto: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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