

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 both your plan and your financial adviser have changed. To make sure you have the most accurate and relevant information, we're sending you updated documents that reflect your current circumstances.

Please find enclosed:

- Your updated Key Changes Summary, explaining how the service upgrade will affect your new product arrangement
- Your updated Charges Schedule, showing the fees that will apply.

Your next steps:

- Review both enclosed documents carefully
- Discuss any questions with your financial adviser about how these changes may affect you
- 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, please speak to your adviser.

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...

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