SCOTTISH WIDOWS PLATFORM

Guide to platform updates – December 2024

For Professional Advisers Only

SCOTTISH WIDOWS

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Scottish Widows Platform gives you access to state-of-the-art digital technology through our user interface (UI) that we are continually developing based on your feedback.

We are excited to share the UI changes we've been working on that can help you to deliver better investment trading and reporting for clients and ensure you can navigate quicker to the key information you need.

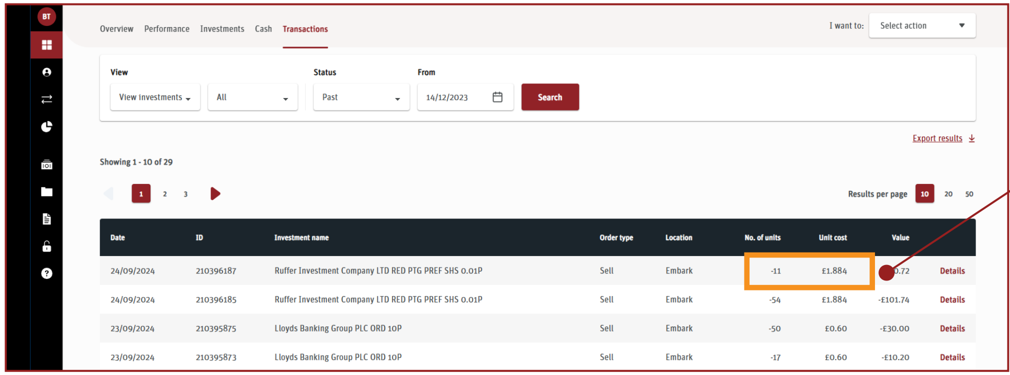
The following enhancements will be in effect from early December 2024:

- **Customer Dashboard investment reporting improvements**: To support your investment trading we're providing more granular data on 'last known price' and 'unit cost value', giving you more accurate information on your clients' investments.
- **Improved Dashboard links and navigation**: We've added new links into the Adviser and Customer Dashboard allowing you to more quickly identify and navigate to the key client information you need.
- **Reducing the risk of overselling assets**: To provide a better digital experience and reduce any accidental overselling of assets, where pending trades have not yet reached their valuation point, we'll temporarily cap the amount that can be sold from that investment to 95% of the total.
- **Sustainability Disclosure Requirements (SDR) investment labelling**: Added a new tab to our FE Fund Centre navigation to enable you to see which funds have a sustainability label or consumer facing disclosure report (note - this enhancement is already live).

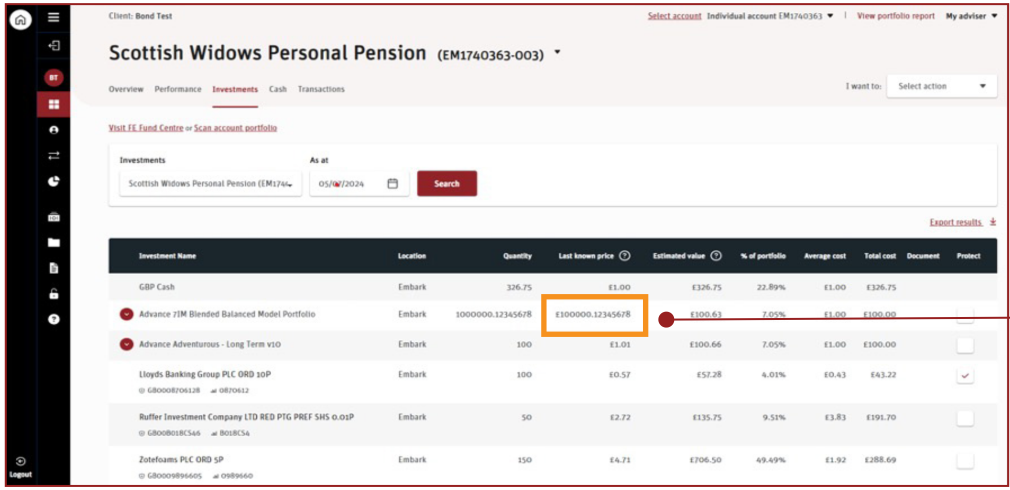
You'll find more information on these enhancements, including screenshots, further on in this guide.

Customer Dashboard investment reporting improvements

Providing you with more granular data on ‘last known price’ and ‘unit cost value’.



Past Investment Transactions: Unit cost value increase from four decimal places to eight.



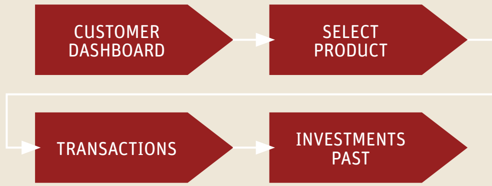
Investment Tab: Last known price displayed up to eight decimal places with no rounding.

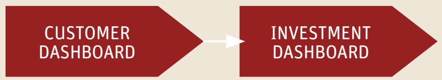
To support your investment trading and reporting we’re providing more granular data to give you more accurate information on your clients’ investments.

For past investment transactions we’re now displaying **‘unit cost value’** to eight decimal places.

And on the investment tab **‘last known price value’** is now shown up to eight decimal places.

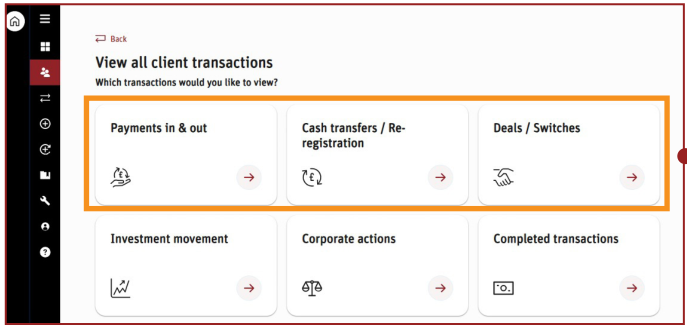
Platform Journey Key



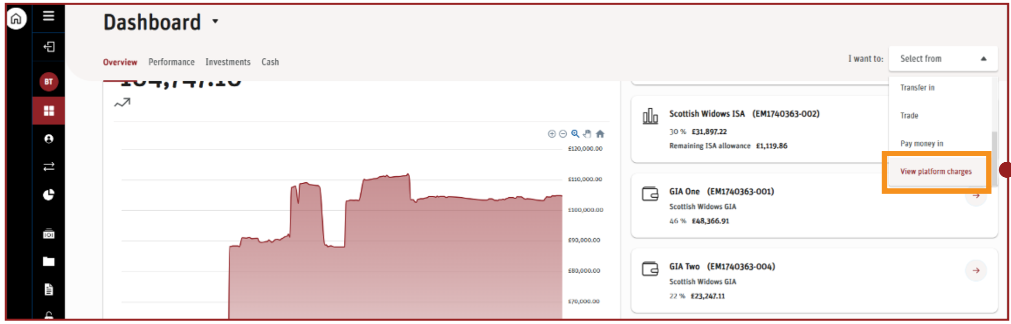


Improved Dashboard links and navigation

Added new links into the Adviser and Customer Dashboard. This will allow you to more quickly identify and navigate to the key client information you need.



Three new tiles and deeper links to client transactions



New 'view platform charges' link added to the "I want to" drop down

Adviser Dashboard:

Redesigned the client transaction page to allow you to quickly identify and navigate to the correct page with the filter automatically applied.

With new client management tiles/links added for:

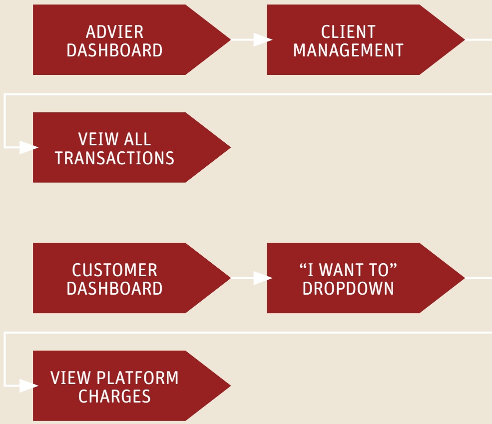
- Payments in & out
- Cash transfers / Re-registration
- Deals / Switches

Customer Dashboard:

Added in a new "I want to" drop down link for:

- View platform charges

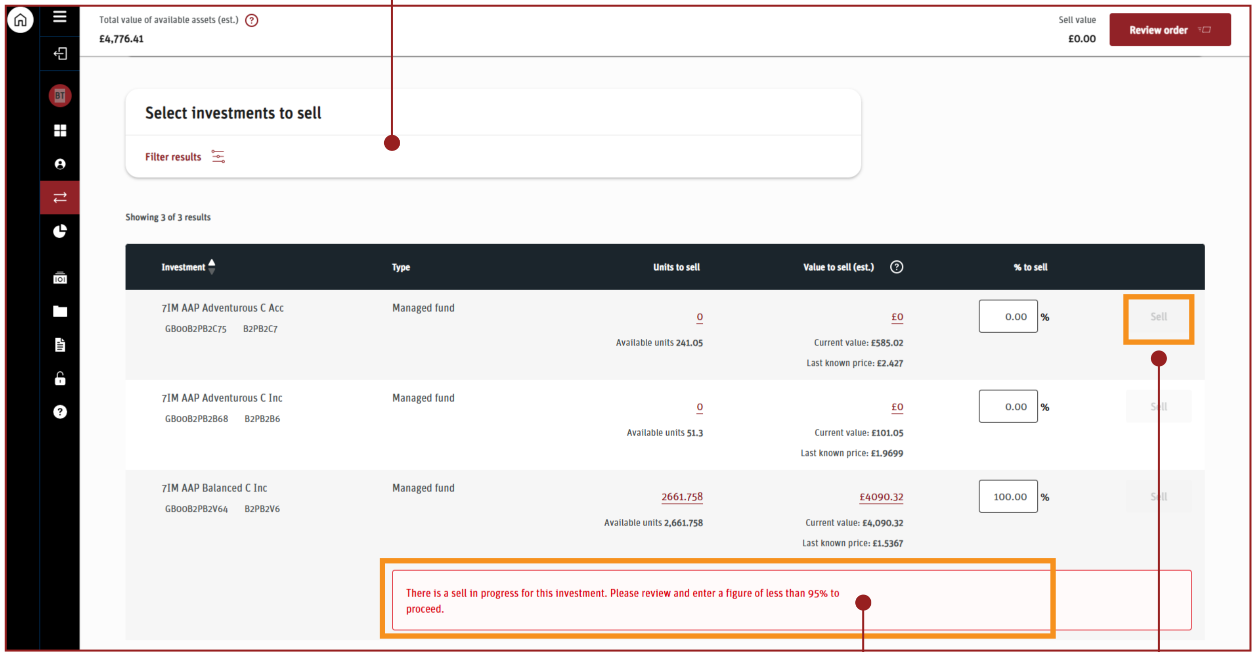
Platform Journey Key



Reducing the risk of overselling assets

When pending trades have not yet reached the valuation point the amount that can be sold from that investment will be temporarily capped to 95% of the total.

Sell all button will not be displayed if there is an inflight sell order present, or transfer all within an inter-account transfer journey.



When an inflight sell order is present and the user inputs over 95% to sell then the sell button is greyed out and a warning message is displayed.

To reduce the risk of accidentally overselling assets:

- When pending trades have not yet reached the valuation point, we'll temporarily cap the amount that can be sold from that investment to 95% of the total.
- Once the valuation point has been passed, (and the first sell has a confirmed price) the full quantity will be available to sell again.

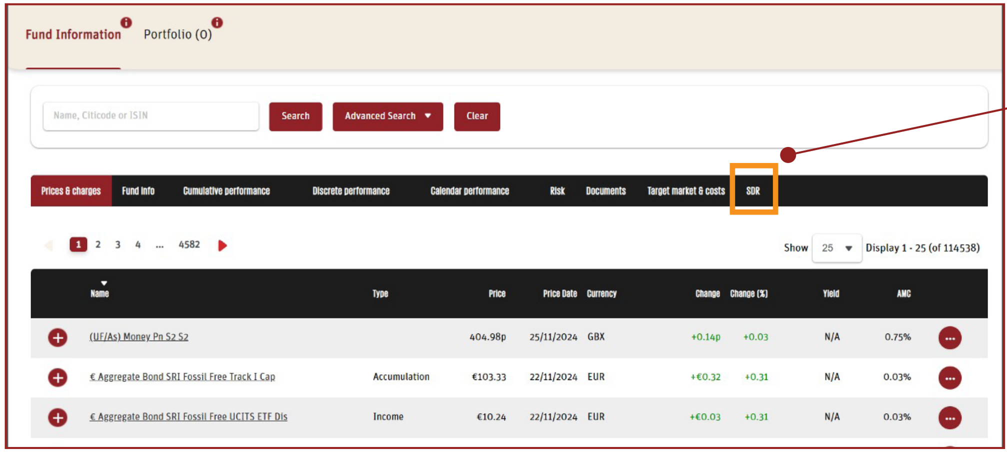
Platform Journey Key

CUSTOMER DASHBOARD → SELECT PRODUCT → SELECT TRANSACTIONS

- Sell investments
- Switch investments
- One-off withdrawals
- Inter-account transfer
- Switch

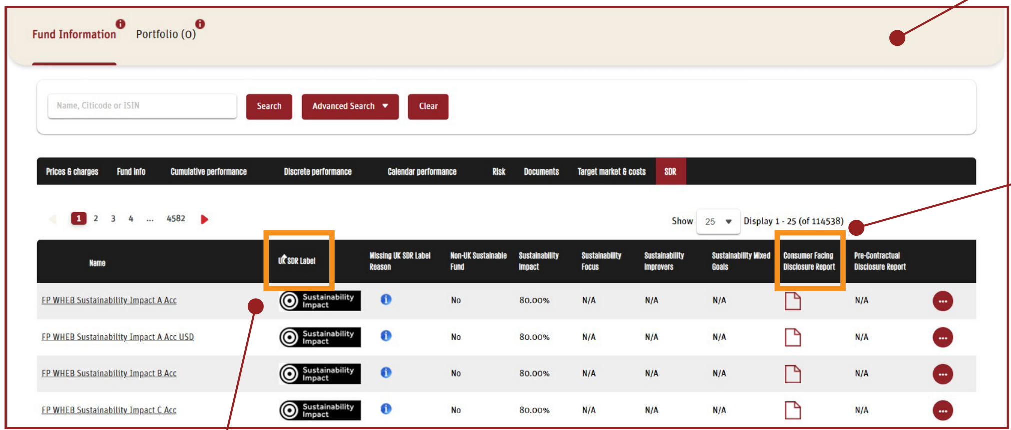
Sustainability Disclosure Requirements (SDR) investment labelling

Added a new tab to our FE Fund Centre navigation to enable you to see which funds have a sustainability label or consumer facing disclosure report.



New SDR tab added into the fund information page.

Clicking this leads to the following new page.



Any funds with a label (or any funds using sustainable related terms) will also have a consumer facing disclosure report.

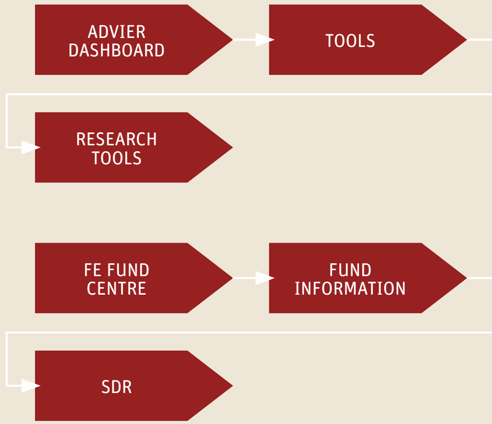
Selecting UK SDR Label will filter any funds that have this label to the top of the list (you can do similar for the 'Consumer Facing Disclosure Report' field).

In order to help you identify sustainable investments in relation to the new FCA SDR rules we've added a new tab into our FE Fund Centre navigation.

This will give you view of which funds have a new sustainability label and/or a consumer facing disclosure report.

To see which funds have a label or a disclosure report you can filter the information to have these at the top of the list.

Platform Journey Key



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