

Advance Portfolio Team
PO Box 1200
Bishops Cleeve
Cheltenham
GL50 9UE

Strictly Private And Confidential

<Recipient Title And Name>
<Address Line 1>
<Address Line 2>
<Address Line 3>
<Address Line 4>
<Postcode>

E: enquiries@embarkadvance.co.uk

T: 01666 333398

September 2023

YOUR MOVE TO THE SCOTTISH WIDOWS PLATFORM

Dear <Name>

We wrote to you recently about moving your Advance Portfolio to the new Scottish Widows Platform (previously known as the Embark Platform).

This change is set to take place on 23 October 2023, unless we update you otherwise. This is also when your new Terms and Conditions will come into effect.

The Scottish Widows Platform runs on the most modern platform technology which will make it easier for your adviser to service your portfolio and for us to deliver enhancements to our products and services. We have a successful record of moving clients from other platforms, and we look forward to welcoming you onto the new Scottish Widows Platform. You can find full details about the Scottish Widows Platform on our dedicated website:

platform.scottishwidows.co.uk/client/welcome-to-scottish-widows

Please read the enclosed **Notice to Investor – Client Key Information** for the details you need to know.

Future communications with you

If we hold your email address on our records, we will use this for all communications to you after your move to the Scottish Widows Platform.

However, if you have provided a valid email address to us, but you still require hard copy (paper) communications, please contact us to request these.

What to do next

There is no action you need to take. We will manage the transfer of your assets and write to you again just ahead of the move. If we have your email address we will send you details of how to log in to the Scottish Widows Platform.

In the meantime, please visit platform.scottishwidows.co.uk/client/welcome-to-scottish-widows where you will find lots more information, including your new Terms and Conditions (T&Cs) for the platform. We know few people enjoy reading the small print, but we encourage it so that you feel informed about where your investments are held.

Also on the website is your new Data Privacy Statement, which explains which personal data we collect, what we do with it, and how long it is kept.

If you would like us to send you a printed copy of either your T&Cs or Data Privacy Statement, in large print or braille, please let us know and we will arrange it.

We will be very pleased to welcome you online to the Scottish Widows Platform on 23 October 2023.

Yours sincerely,

A handwritten signature in black ink, appearing to read 'Jude Nicol', with a stylized flourish at the end.

Jude Nicol
Customer Services Director
Embark Group