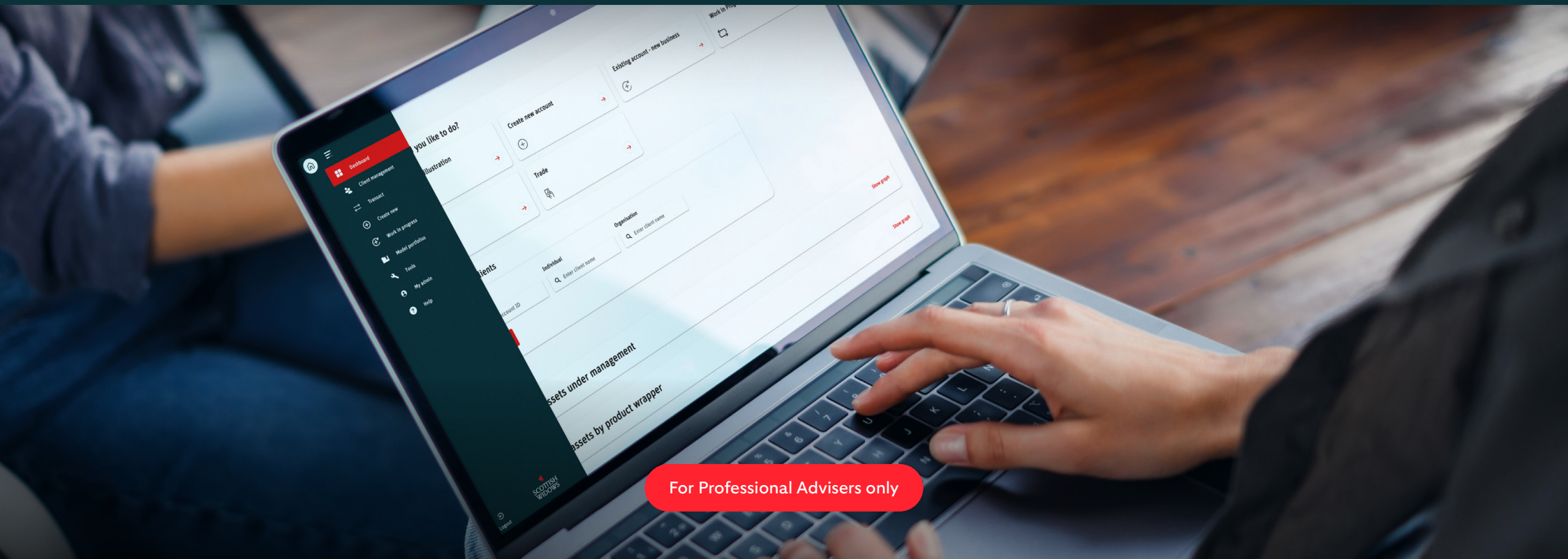


# Scottish Widows Platform

Guide to platform updates – July 2025



For Professional Advisers only

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Scottish Widows Platform gives you access to state-of-the-art digital technology that we are continually developing based on your feedback.

We are excited to share the following enhancements we've been working on, that will come into effect **July 2025**:

## Enhanced payment and buy journeys

Based on your feedback, we have enhanced our payment and buy journeys. You can now choose how much of the available cash you wish to invest, then use our investor selector tool to make those calculations easier.

## More transparent closed / closing accounts

Products that are closed or in the process of closing will be consistently marked as 'closed', making them easier to identify on dashboards and reports. Closed products will also no longer appear on transactional screens.

## Client information bar added

An account holder information bar has been added to all journey screens. This clearly indicates who the transaction relates to, providing helpful context throughout the process.

## Improved navigation

Back buttons have now been added to all journeys, allowing you to easily return to the previous screen, making navigation smoother and more intuitive.

## Scottish Widows rebrand

We're continuing to roll out our refreshed brand identity, including a new colour palette, logo and imagery introduced across our digital journeys. With more changes to be delivered throughout this year.

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

# Enhanced payment and buy journeys



Allowing you to select the amount of the available cash balance or deposited funds to be allocated to investments.

Client  
Ms 24486 Retest Guersney

Account number  
EM1752275-001

Type  
Individual

Product  
Scottish Widows Personal Pension

Buy Investments

Choose how much to invest

How much do you want to invest?

Total Available Cash  
Available: £3,811.30

£

Buy Investments

New fields on the pay-in and buy journey screens

Client  
Ms 24486 Retest Guersney

Account number  
EM1752275-002

Type  
Individual

Product  
Scottish Widows ISA

How would you like to invest?

☒ I'd like to tell you how to invest the one-off direct credit payment now  
Review, amend, and search for the right investments.

☐ I'd like to come back to this later  
The payment will remain as cash on the account until you tell us how to invest it.

How much do you wish to invest?

Pay money in amount: £10,000.00

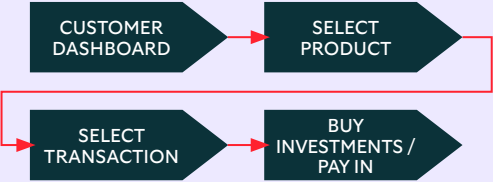
Amount to be invested now:

£

Continue

Based on your feedback, we have enhanced our payment and buy journeys. You can now choose how much of the available cash you wish to invest, then use our investor selector tool to make those calculations easier.

## Platform Journey Key





## More transparent closed / closing accounts

We now highlight when a product is in either a closing or closed state. This will be displayed as 'closed' in both instances and certain transactional activities restricted.

The screenshot displays the Scottish Widows Platform interface. The top section is the 'Dashboard' with a 'Welcome to Scottish Widows Platform' message. It shows a 'Total estimated current value' of £5,652.52. Below this, there are three product tiles: 'Scottish Widows Personal Pension (EM1752262-003)', 'Scottish Widows ISA (EM1752262-002) Closed', and 'GIA One (EM1752262-001) Closed'. A red box with a line pointing to the 'Closed' label on the ISA tile contains the text 'Labels displayed on product tiles on dashboard'. The bottom section is a 'Portfolio report' for 'Mrs Anon Customer 436665 - Individual account (EM1516167)'. It shows a date range from 17/06/2024 to 17/06/2025 and a 'Search' button. Below this, the 'Scottish Widows ISA (EM1516167-001) Closed' is listed with a red dot next to the 'Closed' label. A red box with a line pointing to this label contains the text 'Label displayed here'.

We're now showing clearer information to users regarding account status (closed and closing products now labelled as 'closed'). And these will not be returned when selecting a servicing journey.

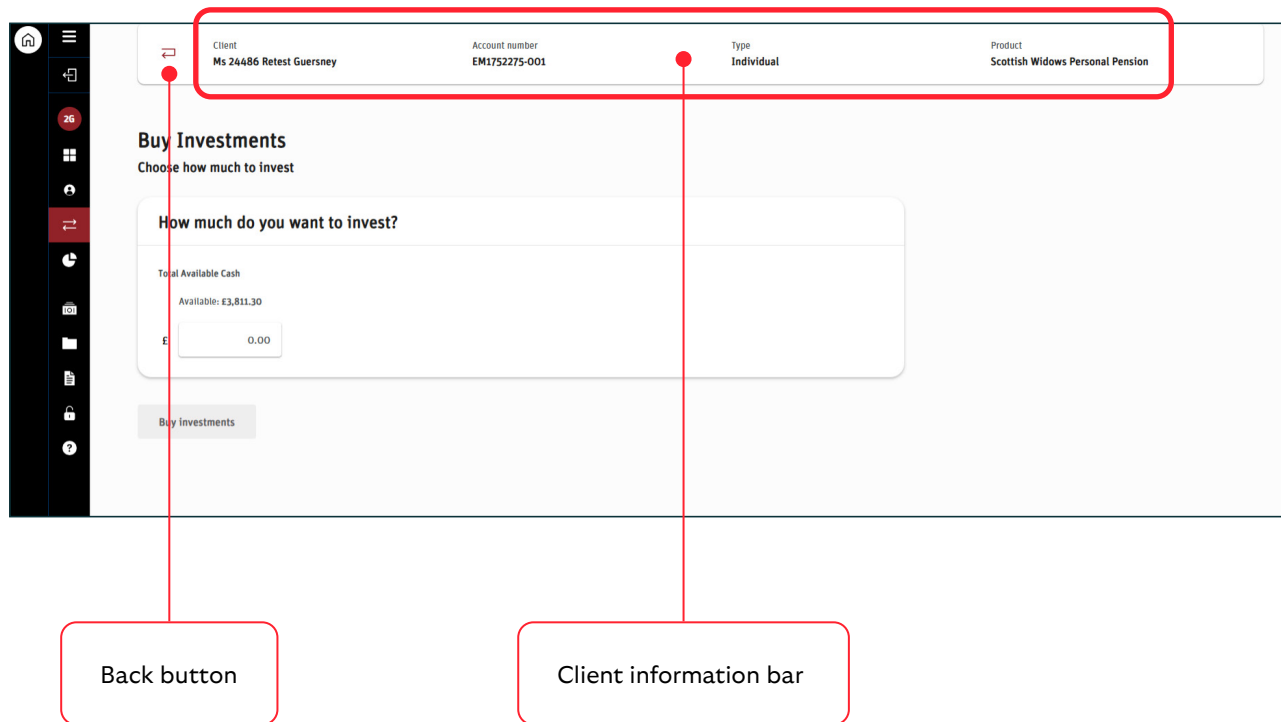
This change is to prevent platform users from accidentally performing activities on accounts that have been requested for closure.

The closure process entails requesting the closure of a sub-account, which then enters a "closing state" for six months to allow for the receipt of any outstanding residual payments.

After six months, the account is officially closed, although a user can request that the account be put into a closed state sooner.

# Client information bar and back buttons added

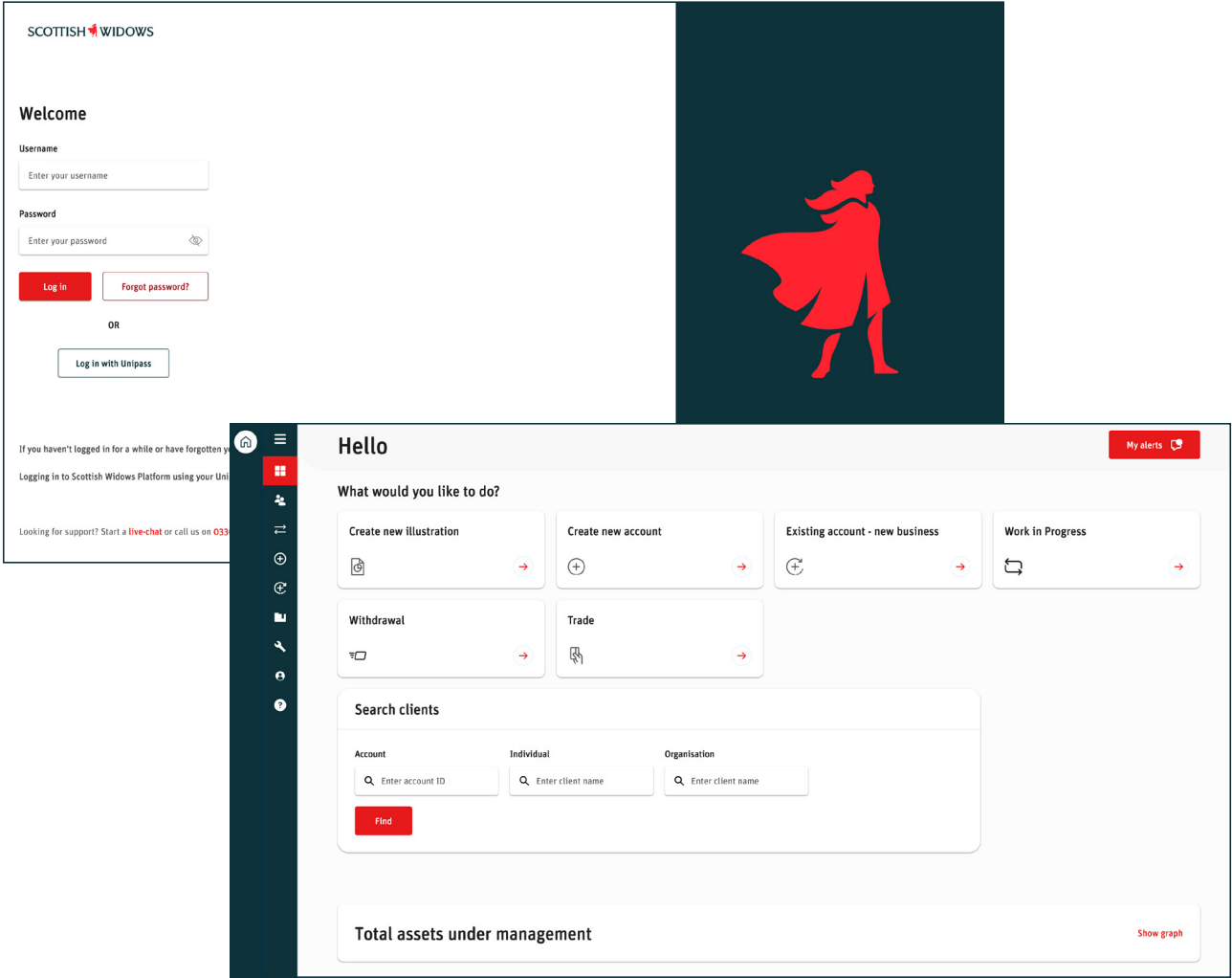
New client information bar and additional back buttons added into journey screens aiding your understanding and improving navigation.



An account holder information bar has been introduced to all journey screens. This clearly indicates who the transaction relates to, providing helpful context throughout the process.

We've also improved platform navigation, with additional back buttons added into all journeys. You can now always go back to the previous step when required, making navigation smoother and more intuitive.

# Scottish Widows Platform Rebrand



We're continuing to roll out our refreshed brand identity, including a new colour palette, logo and imagery introduced across our digital journeys. With more changes to be delivered throughout this year.



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