



WELCOME TO SCOTTISH WIDOWS PLATFORM

We're very pleased to let you know that your move to our new technology, Scottish Widows Platform, is almost complete!

Your Advance by Embark Portfolio will be online on the Scottish Widows Platform from Monday 23 October, meaning you can view your investments and access your documents to manage your account on the new platform. We are very excited to welcome you onto our platform for the future and hope you find it modern and intuitive when it comes to managing your investments.

Setting up your Scottish Widows Platform login

By Tuesday 24 October, you will have received two emails:

1. Your new username
2. A temporary password

Simply follow the instructions in these emails to set up access to your account.

Once you are logged in, you will be asked to select a new, secure password that only you will know. Never share this password with anyone, including us.

When you log into your new account you will find a Confirmation Schedule stored in your online document library. From now on we will use your document library as our primary method to contact you about your account. You will receive an email when you have new documents to read.

Please bookmark this URL in your favourites so that you have it to hand whenever you want to access your account: scottishwidows-platform.com

There is a live chat facility built into every page of the Scottish Widows Platform which means, once logged on to the platform, help is just a few clicks away. This service is available during UK business hours, every weekday (excluding bank holidays)

Getting financial advice

We always recommend that you speak to your adviser regularly to ensure your finances are arranged in the way that's best for you.

If you have applied to transfer away any of your accounts

If you applied to transfer away any of your accounts, these will not move to the Scottish Widows Platform; the transfer will complete from the Advance by Embark Platform. However, your record will transfer to Scottish Widows Platform and any future dividends will be paid by Scottish Widows Platform. You may therefore receive documentation from us in the future.

If you are invested in the Openwork Graphene Model Portfolios

Please be aware that the date that your model portfolios rebalance will change. Your first rebalance on the Scottish Widows Platform may be more or less than six months since the last rebalance. If you are concerned about this, please speak to your financial adviser. After the first rebalance, the rebalances will take place every six months as usual.

Help is at hand

Don't forget, you can find lots more information on our website: platform.scottishwidows.co.uk

If you have any questions about anything covered in this message, you can email us at <mailto:service@scottishwidowsplatform.co.uk> or speak to one of our consultants on **0330 024 2345** (lines open Mon – Fri, 08.30 – 17.00).

On behalf of everyone at Scottish Widows Platform, a very warm welcome.

Yours sincerely,



Jude Nicol

Customer Services Director,
Scottish Widows Platform

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