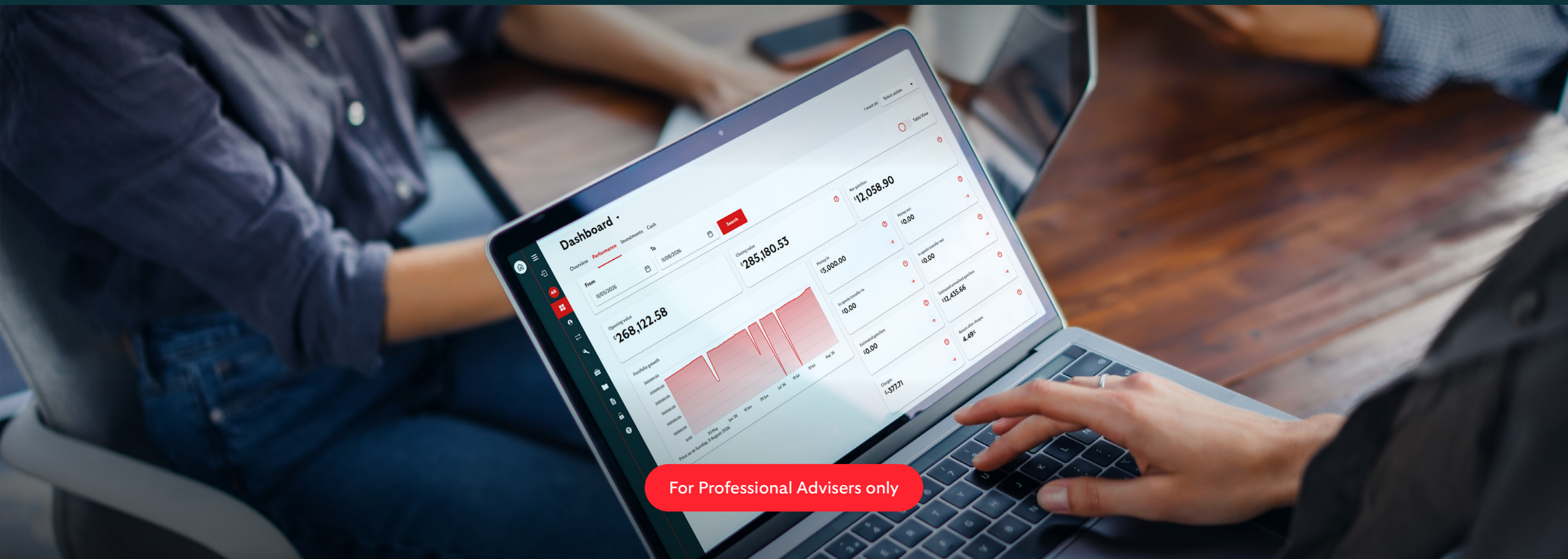


Scottish Widows Platform

Guide to platform updates – August 2026



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

We're pleased to share the following platform enhancements that will come into effect August 2026.

Client Dashboard enhancements

We've made the following user experience enhancements to our Client Dashboard:

- **Withdrawable cash tile added to the Product Dashboard:** Making it easy to see how much settled cash is available to be withdrawn.
- **New cash & transfer flow tiles on Performance Dashboard:** Cash and transfer activity is now split into four dedicated tiles, helping to better track and understand account movements.

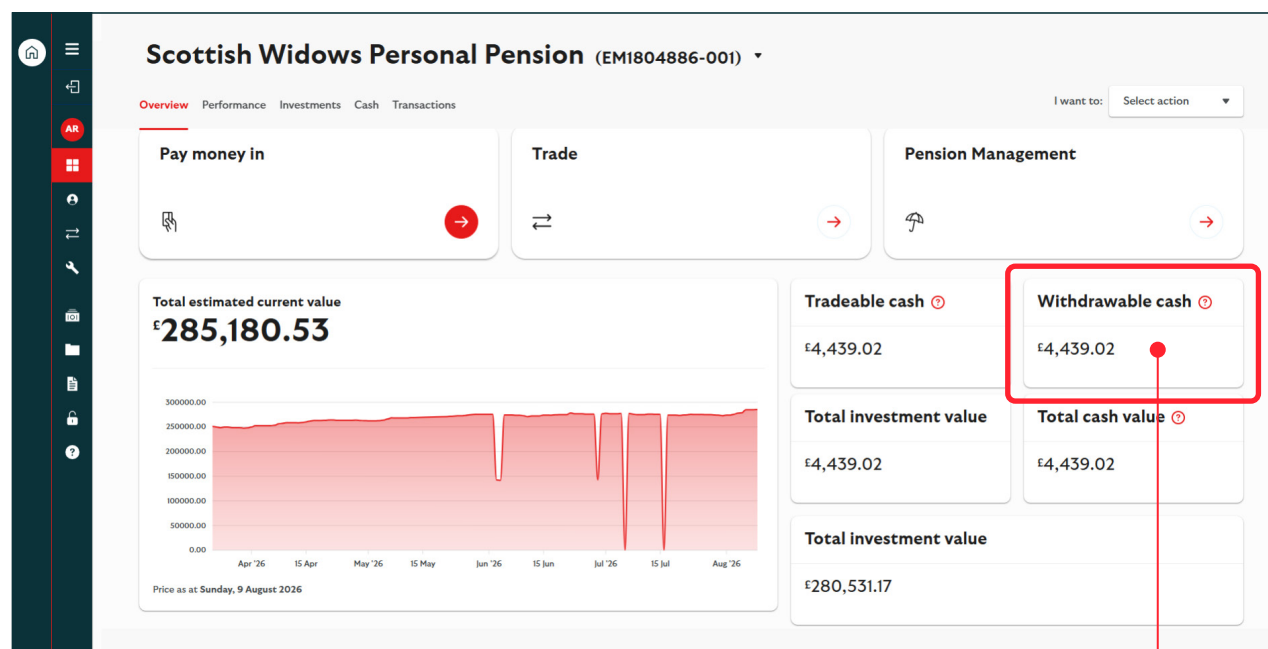
We're also working on further enhancements that will allow you to access more granular Performance Dashboard data, and look forward to sharing these with you soon.

Platform cyber security enhancements

Alongside these user-facing enhancements, we are strengthening the platform's cyber security and resilience, benefiting from the scale, expertise and resources of Lloyds Banking Group. While these improvements sit behind the scenes, they ensure Scottish Widows Platform remains a secure, resilient and reliable long-term home for your clients' assets.

Withdrawable cash tile added to the Product Dashboard

Our new tile makes it easier to see how much settled cash is available to be withdrawn from a product.



All cash available for withdrawal, excluding any uncleared funds.



Withdrawable cash tile

Previously the Client Dashboard presented Cash Available for spending, Investment value and Total Cash Value, but did not show how much cash was available for withdrawal.

We've now added a new **Withdrawable Cash** tile. By bringing this information front and centre, users can quickly see how much cash is available to withdraw without searching or having to guess which funds have cleared.

The tile is available for the following products:

- GIA
- ISA
- Pension (where the client has reached Normal Minimum Pension Age)

And will not be available for:

- Junior ISA
- Junior Pension

Platform Journey Key

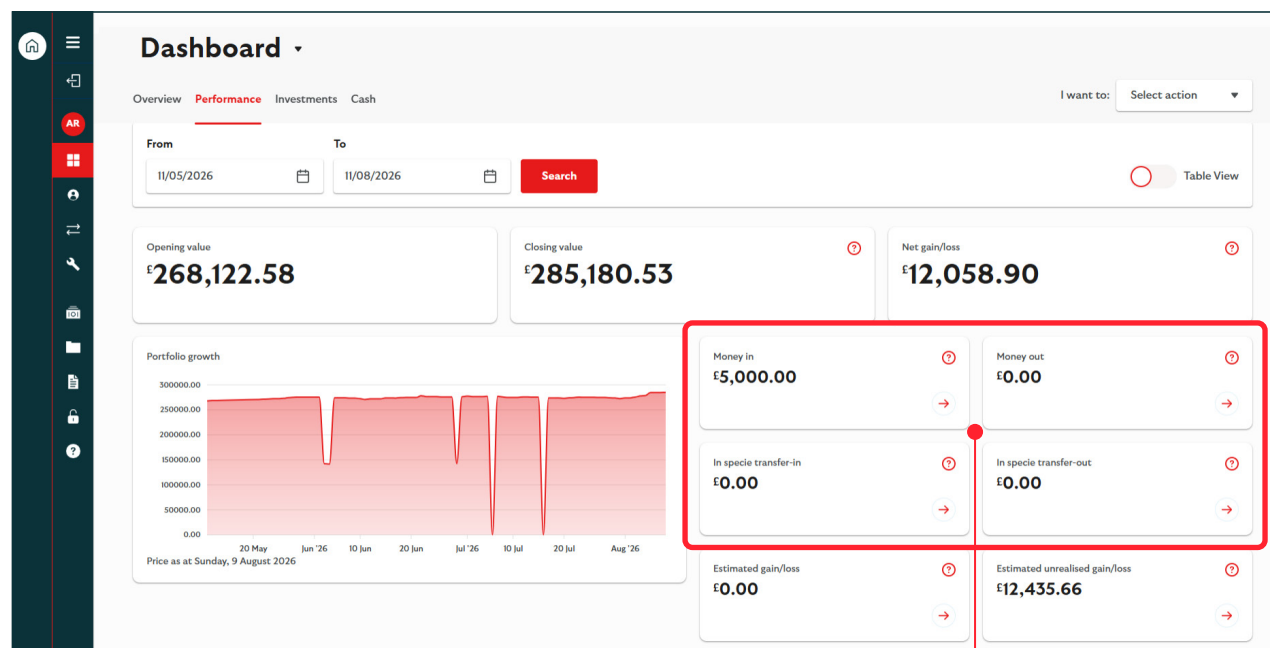


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New cash & transfer flow tiles on the Performance Dashboard

Cash and transfer flow activity is now split into four dedicated tiles. Giving you more detail and helping you track and understand account movements over time.



Now split into four dedicated tiles for a clearer breakdown of account movements.

Cash and Transfer Flow tiles

Previously, deposit and transfer activity was displayed across two tiles: Money In and Money Out on the Performance Dashboard.

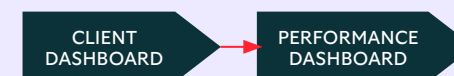
We've now split this information into four dedicated tiles:

- **Money In**
- **Money Out**
- **In Specie Transfer In**
- **In Specie Transfer Out**

This makes it easier to track and understand account movements over time.

Platform Users can continue to view this information at both portfolio and individual product level.

Platform Journey Key



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