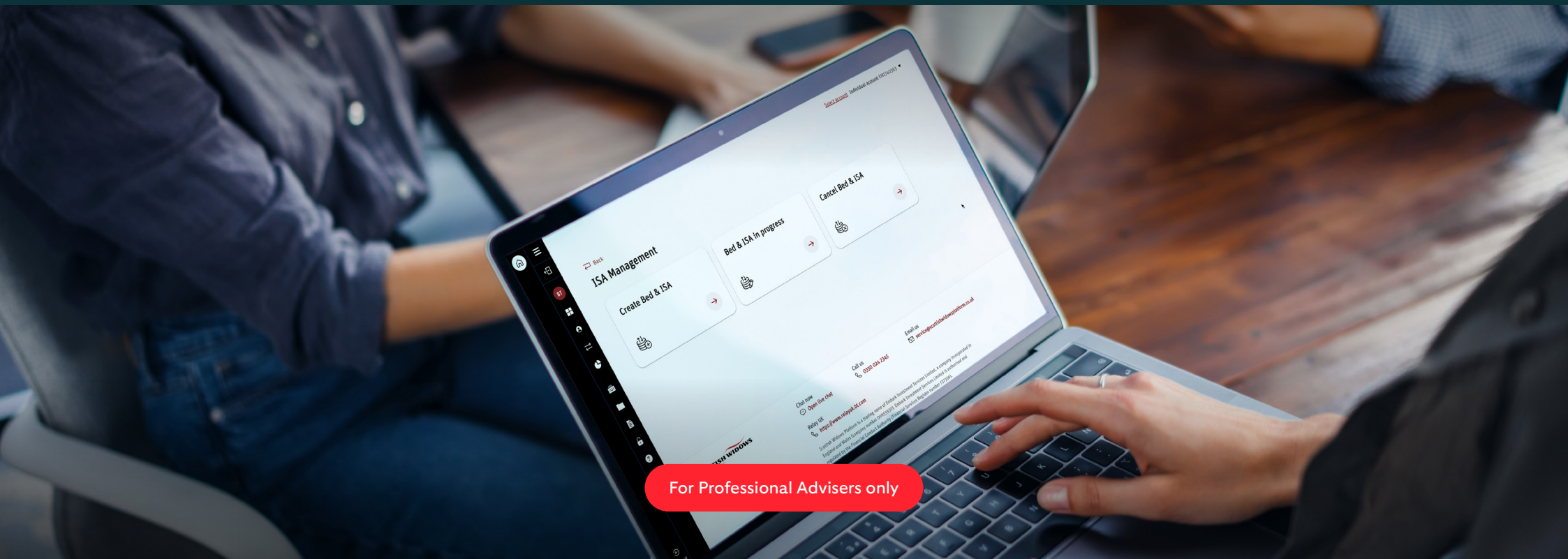


Scottish Widows Platform

Guide to platform updates – February 2025



For Professional Advisers only

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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 have better sustainable investment conversations and make it easier to manage your clients' ISA allowances.

The following enhancements will be in effect from **Mid February 2025**:

- **Sustainability Disclosure Requirements (SDR) investment labelling:** we've added the ability to identify funds with sustainability labels and consumer-facing disclosure reports into more places on the platform. This can help to make it easier to have sustainable investment conversation with your clients and save you time.
- **Next tax year ISA contribution journey improvements:** when you set up or edit a payment that impacts next tax year's ISA allowance, we'll display your client's available allowance for that year, along with the current year's allowance. This means you can have more informed tax year end conversations, helping you to maximise your clients' allowances.

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

Sustainability Disclosure Requirements (SDR) investment labelling



We've added the ability to identify funds with sustainability labels and consumer-facing disclosure reports into more places on the platform.

Sustainability labels will display here (if applicable).

Showing 2 of 2 results for — 'FP Wheb'

Investment	Type	TFC	UK SDR label	Documents	Buy value (est.)	% to invest
FP WHEB Sustainability C Acc GBOOB8HPRW47 BHPWR4	Managed fund		Sustainability Impact	Factsheet KIID Sustainability disclosures	£ 0.00 Last known price: £2.872	0%
FP WHEB Sustainability C Inc GBOOBHBFNO3 BHBFFNO	Managed fund		Sustainability Impact		£ 0.00 Last known price: £2.0395	0%

Consumer-facing disclosure reports will be displayed alongside KIIDS/Factsheets (if applicable).

Investment Name	Location	Quantity	Last known price	Estimated value	% of portfolio	Average cost	Total cost	Document	Protect
GBP Cash	Embark	223820.01	£1.00	£223,820.01	59.42%	£1.00	£223,820.01		
FP WHEB Sustainability C Acc GBOOB8HPRW47 BHPWR4	Embark	1000	£2.872	£2,872.00	0.76%	£2.87	£2,872.00	Fact Sheet KIID Sustainability disclosures	
FP WHEB Sustainability C Inc GBOOBHBFNO3 BHBFFNO	Embark	1000	£2.0395	£2,039.50	0.54%	£2.04	£2,039.50		
Janus Henderson AIStkCr A A	Embark	1000	£1.565	£1,565.00	0.42%	£1.57	£1,565.00		

Things to note

Last year, we introduced a new tab into our FE Fund Centre, allowing you to easily identify funds with sustainability labels and consumer-facing disclosure reports.

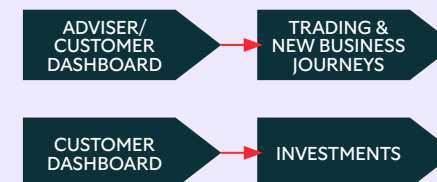
Now, we've taken this a step further. with the functionality now available wherever you search for a fund on our platform.

There are four sustainability labels (Focus, Impact, Improvers, Mixed Goals) that if applicable will be displayed on our investment selector screens.

The consumer-facing disclosure reports will be presented in the same way we display KIIDs and Factsheets. These will also be displayed on our investment selector screens and where we display holdings.

We will also display a label containing a warning to investors where the instrument is not subject to UK sustainable investment labelling and disclosure requirements.

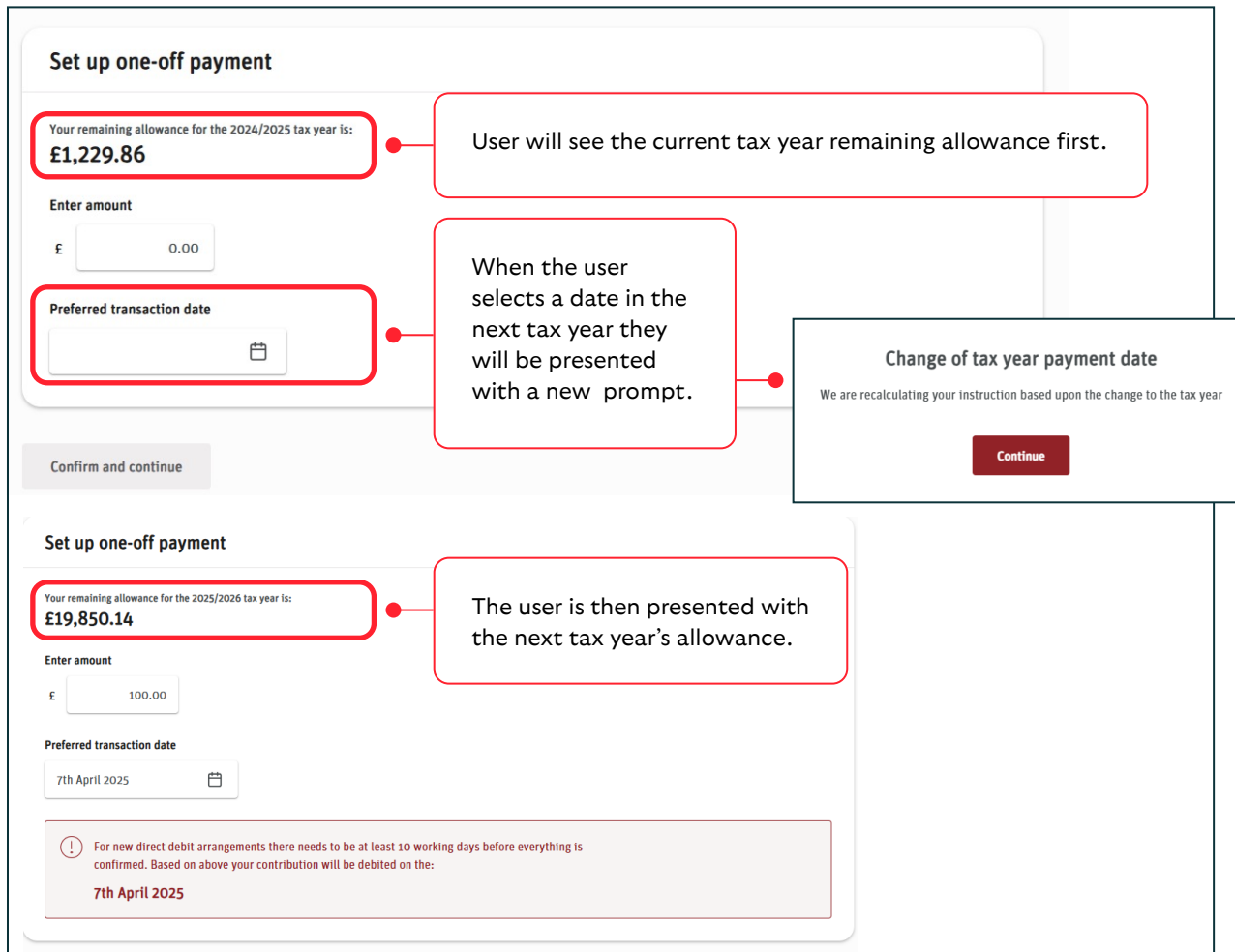
Platform Journey Key





Next tax year ISA contribution journey improvements

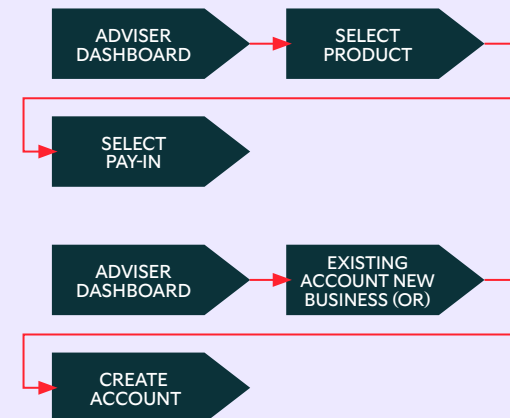
When you set up or edit a payment that impacts next tax year's ISA allowance, we'll display your client's available allowance for that year, along with the current year's allowance.



If you have clients that have not yet utilised their full ISA allowance for the current tax year, you can set up or edit a contribution that will impact on the next tax year.

When this happens, we'll display your client's available allowance for the next tax year, along with the current year's allowance.

Platform Journey Key





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