



Scottish Widows Platform

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Strictly Private And Confidential

<Recipient Title And Name>

<Address Line 1>

<Address Line 2>

<Address Line 3>

<Address Line 4>

<Postcode>

Ref: <Reference>

October 2023

WELCOME TO SCOTTISH WIDOWS PLATFORM

Dear <Name>,

We're very pleased to let you know that your move to our new technology is complete and we are delighted to welcome you onto the Scottish Widows Platform.

Your Advance by Embark Portfolio has now moved to the Scottish Widows Platform, meaning you or your financial adviser can view your investments, access your documents and use our tools to manage your account on the new platform.

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

Setting up your own Scottish Widows Platform login

The Scottish Widows Platform is designed to be a digital platform and works best if you access it online. In order to set you up with online access we will need you to provide us with an email address. We can then communicate anything we may need to, in the most efficient and secure way, through the platform.

Please call us on **0330 024 2345** or write to us at service@scottishwidowsplatform.co.uk with your email contact details so we can get you set up with a username and secure password quickly and simply.


If you do not want online access we will continue to send you paper documents through the post when we need to communicate with you.

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.

 **0330 024 2345**

 service@scottishwidowsplatform.co.uk

 scottishwidows.co.uk/platform

Scottish Widows Platform is a trading name of Embark Investment Services Limited (EISL), a company incorporated in England and Wales (company number 09955930). Registered office at 100 Cannon Street, London, EC4N 6EU. Embark Investment Services Limited is authorised and regulated by the Financial Conduct Authority (Financial Services Register number 737356).

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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

If you have any questions about anything covered in this message, you can email us at 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

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

Jude Nicol

Customer Services Director
Scottish Widows Platform