myM&G
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## A fresh new look is coming to myM&G

MyM&G is moving to a new platform on **25 January 2027**. It will have a fresh look, improved security and new features to make managing your account simpler.

To help make the move as smooth as possible, we'd like to explain what is changing, what you may need to do before the launch date and the support available if you need any help. Our priority is to make the transition as straightforward as possible and to keep you informed every step of the way.

### Your online safety comes first

One thing that isn't changing is our commitment to keeping you safe online. You'll use two-factor authentication (2FA) when you log in, giving your account an extra layer of security. Even though the site will look different, you can feel confident that your safety is still at the heart of what we do.

### Updated Terms and Conditions

As part of the improvements, and to reflect the changes highlighted below, we'll be updating our **Terms and Conditions**. We've also made small adjustments to tidy up other terms/sections. You'll find a copy enclosed with this letter, and on the Terms and Conditions webpage.

## What's changing?

When the new version of myM&G launches, you'll notice the following updates:

### We're introducing some new features:

- ✓ **Increased security**
  As mentioned above, we're introducing additional security features to keep your information protected including **two-factor authentication (2FA)** when logging into your account.
- ✓ **Secure document upload**
  If you need to send us identification, verification or legal documents, such as a marriage certificate to support a name change, you'll be able to upload them securely online instead of sending them by post.

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### Some things will be changing:

- ✓ Your myM&G **account number** will change to reflect the new security features. We'll send your new account number to you by post during the week before going live.
- ✓ Your new **username** will be your email address making it easier to remember and to log in.
- ✓ You'll have more time to submit buy and sell instructions for funds. Instructions received by 12:00 noon on a business day will receive that day's **price** (rather than the current 11:00).
- ✓ **Fund distributions** will usually be paid on the last business day of the month (rather than the fourth business day), meaning payments will reach you four days earlier.
- ✓ Your **transaction history** will be transferred to the new system in a PDF-only format and will be available in your Documents store shortly after the move. All transactions from launch of the new platform will be available to view online as normal.
- ✓ **Switching** between funds will be processed in one working day rather than two, meaning your investment will not be out of the market.
- ✓ Half-yearly **Investment Statements** will be issued in line with the UK tax year, as at 5 April and 5 October, rather than on the anniversary of your first investment. This will assist anyone needing to complete a UK tax return. Your next statement will therefore be issued as at **5 April 2027**.
- ✓ Our telephone and postal **contact details** will change. We'll provide these details nearer to the live date.
- ✓ The **valuation line chart** on your Dashboard and Valuation page will be unavailable until the second half of 2027. We will update you via Secure message as to when this feature will return. Your product and total holding values will not be impacted.

### And some things will be going:

- × We are removing some of the older tools which we found most people weren't using anymore – **Asset Tracker** and **Share my account**. If you currently use Share my account, the person you granted access to will no longer have access once the platform goes live.

### What do I need to do before the effective date?

- If you see a yellow box on your **Dashboard**, it means there is an outstanding action on your account. Please complete any required actions as soon as possible. A red box is for information only and appears on all customer dashboards. If you have any questions before the new myM&G platform launches, please contact us via Secure message or Chat.
- It's important that we hold up-to-date personal information for you, including your email address, postal address and telephone number. Please check these details by selecting **My account** and then **My details**.

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- As your email address will become your username, it must be unique to you. If you currently share an email address with another myM&G investor, such as a partner, one of you will need to update your email address before the move.
- There are two key deadlines to be aware of if you need to make changes to your investments before the effective date:
    - **Friday 18 December 2026** – deadline for transferring investments in and out of your account
    - **Friday 15 January 2027 at 11:00** – dealing closes for the platform move. During the non-dealing period you will not be able to buy, sell, switch or withdraw money. Dealing will resume on **Monday 25 January 2027**
- As part of our ongoing journey to ensure a high level of security of your investments, **you may be required to (re)verify your identity**. You only need to take action if we have contacted you via a secure message. If we have, please provide the requested information as soon as possible, as we may be unable to process certain account activity until these requirements have been met. If you have already provided the documentation, no further action is required.
- If there are any documents in your **Documents** library that you may need in the future, please download or print them before the move, as they won't be transferred to the new platform. This includes documents such as Investment Statements or Consolidated Tax Vouchers (GIA only).
- As a reminder, if you have money in your ISA Cash Park facility this should only be a temporary home (as a guide, no longer than six months) whilst you decide where to invest it. To action this, please go to your **Valuation** page and click on the ISA tab where a cash amount will be displayed if cash is held. You can then invest in any of our funds (by using the 'Top up' function and then using the 'Invest using Cash Park' option) or 'Withdraw' from Cash Park.

### Making changes to your investment

You can sell your investments or transfer them to another provider before or after the changes take place, subject to the temporary restrictions outlined above and our **Terms and Conditions**. We don't charge a fee to sell or transfer your investments.

### Keeping you informed as we get closer to the launch date

We'll be in touch again with more details as we get closer to launch, so you know exactly what to expect. These will be via Secure message and will include a reminder of the date of the change, confirmation of non-dealing days, deadline for changing your personal details and how to log in to the new website.

Because this information is important, we'll also send you a copy by post. To ensure you receive all future updates, please check that your contact details are up to date.

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## We’re here to help

If you are in any doubt as to the action to be taken, please contact us as soon as possible via secure message or our Chat facility, or consult your financial adviser, if you have one. You can also contact us by calling 0808 178 4035 (or +44 (0)808 178 4035 if calling from overseas). We are available from 08:00 to 18:00 Monday to Friday, and from 09:00 to 13:00 on Saturday (excluding UK bank holidays). For your security and to improve the quality of our service, calls may be recorded.

Please be aware that we are not in a position to give you investment advice. You can find information on how to access financial advice on our **website**.

**Thanks for being part of myM&G.**

**The myM&G Team**