



OLD MUTUAL
WEALTH

Northern Bus Ret Ben Scheme
Pension Practitioner
Venture Wales
Merthyr Tydfil Industrial Park Pentrebach
Merthyr Tydfil
Mid Glamorgan
CF48 4DR

Dear Policyholder

Change of your financial adviser

What has happened?

We have been notified that your financial adviser firm has transferred the servicing rights and any servicing fees of their clients to Tag Wealth Management..

Tag Wealth Management. has confirmed that they have written to you to confirm the transfer of servicing and fees, and that they will be providing the same level of service that you have been receiving.

What does this mean?

Your policy/policies and any servicing fees have been transferred to Tag Wealth Management. at the same rate as before, which is detailed below:

Policy Number	Fee % or £ amount per year	Deduction Frequency
100277232	0.50%	Quarterly

Please note that percentage fees are based on the fund value and may go up or down

What do you need to do?

If you consent to the transfer of your policy(s) and fees then you do not need to do anything.

If you require any other information, or if you object to the change of financial adviser or payment of servicing fees attributable to their servicing of the policy/policies please call our Customer Service Centre within 14 days on 0808 171 2626.

Yours sincerely

Mark Hibbitt
Head of UK Wealth Client Services

1 October 2020

Call us
Customer Service Centre
Freephone: 0808 171 2626

Open Mon – Fri 8.00am to 7.00pm

Email us
ask@omwealth.com

Write to us
Old Mutual Wealth
Old Mutual House
Portland Terrace
Southampton
SO14 7AY

Visit our website
www.oldmutualwealth.co.uk

What to do next

- Let us know if you have any questions about this letter