PSG Wealth

Adviser Notice 65

May 2019

Dear Adviser

We are introducing an additional communication to retirement fund members

Clients in the PSG Wealth Retirement Annuity Fund, PSG Wealth Pension Preservation Fund and PSG Wealth Provident Preservation Fund will now receive annual communication in addition to their current quarterly statements, with the first emails due to be sent next week.

Personalised statements are available via myPSG
Annual statements are available online via myPSG. These will be loaded under the PSG Wealth retirement product and clients can access them by clicking on the specific product name. The statement contains information on clients' investments from 1 April 2018 to 31 March 2019.

The information document provides key information on the Funds
We will be including a static document that outlines core information on the Funds, such as more details about the trustees, their responsibilities, and key contact information. We are also using this opportunity to encourage members to update their beneficiary nominations. You can view the draft document here.

Queries?
If you have any queries, please contact your investment specialist or your dedicated client service team.

Kind regards

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Head of Client Service

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