

## WELCOME EMAIL

You will receive your welcome email initially upon joining eSwitch, please check junk/spam folders for this email. Right clicking the email and selecting (not junk/never block) should prevent this. More info can be found in your email providers help section regarding this.

## STEP ONE

Your quarterly emails will be sent around the 7<sup>th</sup> of February, May, August and November; these will include a secure link to your eSwitch account home page, underlined in blue and titled '[CLICK HERE](#)'.

Your latest eSwitch review is now ready.

Please [click here](#) to go to your eSwitch home page, where you can view your response.

## STEP TWO

Click '**VIEW LETTER**' to display the recommended changes to your portfolio in a table format (a PDF reader is needed)

Click '**BACK**' in the internet browser to return to the homepage and then select '**Respond to All**'.

| Policy Number  | Product | Provider              |                                |
|--|---------|-----------------------|--------------------------------|
| 123456   | NISA    | Old Mutual Wealth (W) | <a href="#">View Letter</a>    |
| By clicking on the 'Respond to All' button you are confirming that you have viewed and read all the above eSwitch letters. |         |                       |                                |
|  |         |                       | <a href="#">Respond to All</a> |
| Policies   |         |                       |                                |

## STEP THREE

Once you have viewed all the necessary information and you're happy to proceed with the proposed changes, please click the '**ACCEPT**' button.

### Accept

I confirm I have read and understood my eSwitch letter(s), along with any Key Investor Information Document(s) (KIID) that apply to my portfolio (please see below for more information on KIID) and I DO wish to proceed with the recommended changes. I also confirm I have noted any changes to my personal and/or financial circumstances in the text box provided below.

[Accept](#)

## COMPLETED

After responding, a message will display confirming the submission and you will be automatically returned to the homepage. Here you can see a list of your portfolios and their details.

## Thank you

**Your response has been submitted.**

You will be re-directed to the main page in 10 seconds.

## COMMENTS

If you would like to leave a comment for your adviser, this can be done on the page after selecting 'Respond to All' or alternatively on the home page at any time of the year. Once you are satisfied with your message, please click the 'Add Comments' button located directly under the comments box.

