

UPDATE: NEW WORKFLOW SYSTEM FOR OLD MUTUAL UNIT TRUSTS

As part of the Old Mutual business transformation initiative, Old Mutual Unit Trusts recently migrated to a new workflow system in order to enhance our service delivery to you. This has resulted in changes to the way in which we service and interact with our clients.

We are currently experiencing some challenges in the initial implementation of our workflow system and would like to apologise for the impact this has had on you and your clients. We are working tirelessly to resolve all the implementation issues and are confident that these will be resolved shortly. We can assure you that we are committed to enabling you to provide a superior client service experience.

We have identified that the auto response was omitted with our system changes post migration, as communication is only sent once the transaction instruction or change request has been finalised. We have received feedback from clients and our advisers that they would prefer us to send an acknowledgement of their request. We are therefore in the final stages of enabling the auto response.

We are also delighted to communicate that the new system features an enhanced communication capability, which enables us to keep clients and advisers informed of the progress of their applications. We will now be able to send confirmation of transactions either via SMS or email to our advisers and clients.

In addition, our administration team is now able to access all documents submitted via Old Mutual branches, Mass Foundation Cluster and Retirement Fund Administrators, thereby removing the client frustration of having to submit the same documents to multiple areas.

Our value proposition to provide our clients with peace of mind is at the forefront of all our efforts.

Thank you for your continued support. We can assure you that we remain committed to providing you with excellent service.

Please feel free to contact us on **0860 234 234**, should you have any queries.

Kind regards



Belinda Duff
Unit Trust Client Operations Manager

