

Our ref: Sample

(Date)

# Sample copy

Dear (Salutation)

## Fund name and investment policy changes

Account number:  
Your financial adviser:

I am writing to you because you are invested in one or more of the below funds, provided by BNY Mellon Fund Managers Limited.

BNY Mellon will change the names and investment policies of the funds from 02 April 2025. You'll see the new fund name on our valuations and statements after this date.

Old fund name	New fund name
BNY Mellon Sustainable European Opportunities	BNY Mellon European Opportunities (Responsible)
BNY Mellon Sustainable Global Dynamic Bond	BNY Mellon Global Dynamic Bond (Responsible)
BNY Mellon Sustainable Global Equity Income	BNY Mellon Global Equity Income (Responsible)
BNY Mellon Sustainable Real Return	BNY Mellon Real Return (Responsible)
BNY Mellon Sustainable UK Opportunities	BNY Mellon UK Opportunities (Responsible)

You may want to speak to your financial adviser about the impact of the change. Please speak to them before making any investment decisions, or if you have any questions about the change.

**If you don't have a financial adviser**, we recommend that you consider the benefits of receiving professional financial advice, which can be especially important when you need to make investment decisions. If you would like to search for an adviser in your area you can start by visiting [quilter.com/financial-advice/find-an-adviser](https://quilter.com/financial-advice/find-an-adviser).

## How this will affect your account

- **The value of your holding** – The changes will not affect the value of your fund holding.
- **Risk profile** – The fund's risk profile will not change.
- The Annual Management Charge (AMC) of the fund will not change.

### Why the funds are changing

As part of the FCA's Sustainability, Disclosure Requirements (SDR), the FCA has introduced four sustainable investment labels. After 2 April 2025, a fund must apply an SDR label if its name includes the term 'sustainable'.

As SDR labels are not being applied to these fund at this time, the word 'Sustainable' has been removed from their names. The new names reflect the sustainability characteristics and responsible investment approach of the funds, and align to the naming and marketing rules under SDR.

The fund's investment policies have been updated to provide more detail in the Investment Manager's process for selecting assets in line with the sustainability characteristics. There is no change to the investment objective or portfolio of the funds as a result of these amendments.

### The next steps

You don't need to take any action unless you would like to choose a new asset from our extensive range. Please speak to your financial adviser before making any investment decisions or if you have any questions about this change.

If you have any questions about this letter, please speak to your financial adviser who will be able to help you. Alternatively, you can call or email us using the details shown and we will be happy to help. Our Customer Service Centre is open 8:30am – 5:30pm, Monday to Friday.

Yours sincerely

A handwritten signature in black ink that reads "Callum Earl". The signature is written in a cursive, flowing style.

**Callum Earl**

*Head of Client Services*