

Our ref: Sample

(Date)

# Sample copy

Dear (Salutation)

## Name change for the Royal London US Growth Trust fund

**Account number:** \*\*\*\*\*

**Your financial adviser:** \*\*\*\*\*

I am writing to you because you are invested in the Royal London US Growth Trust fund, provided by RLUM Limited .

RLUM Limited will change the name of the fund from **31 July 2025**.

You'll see the new fund name on our valuations and statements after this date.

Old fund name	New fund name
Royal London US Growth Trust	Royal London US Equity Trust

The fund objective, risk profile and Ongoing Charges Figure (OCF) / Total Expense Ratio (TER) will not change.

The OCF/TER represents the ongoing charges for the fund, expressed as a percentage. It is the sum of the Annual Management Charge (AMC) and all other running costs of the fund. OCF is increasingly replacing TER.

### Why the change is happening

This change is being made to more accurately reflect that the fund invests in US companies which do not necessarily have a Growth bias. RLUM believe that this provides greater clarity for unitholders.

### 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 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).

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



**Callum Earl**

*Head of Client Services*