

Keeping your investment safe

There continue to be many headline grabbing stories of hacking, or use of disruptive computer programmes for criminal activity, the aim being to make financial gain by obtaining individuals' personal information such as bank account details, illegally.

Whilst money laundering and terrorist financing tend to grab the headlines, they are not the only areas of financial crime which we need to be aware of. Identity theft, impersonation fraud and cybercrime all have the potential to affect us personally. We place the highest importance on the security of your investments and your personal data and have systems, policies and procedures designed to provide protection. However, with your assistance, we can reduce the risks even further.

Please note:

- We will only contact you by telephone to verify an instruction that you have already made, and to ensure your request is genuine. We will never cold call you.
- We will verify your identity against our records before we release any details of your investments. If you do call us, it would be helpful if you could have your account details to hand.
- We do not make requests for any personal information, bank details or other sensitive data from you, nor make a direct request for deposits, although we may call, or write to you, to verify your bank details.
- We may use an accredited service company to verify your details, to confirm that they are genuine.
- From time to time, we will request personal documents from you, such as a passport and driving licence, in order to ensure your identity is protected. We appreciate that this may be inconvenient but it is essential to ensure that we only take instructions from you. We will only request these documents if we consider it necessary and as a preventative measure. As photocopies, emails and faxes can easily be altered, we may want to see original documents as they have special identifiers.
- We provide relevant documentation for your investment on our website, or we will send it to you through the post. We will not send emails which require you to contact us, or for you to click on a link.
- We provide an online valuation service but if there is inactivity for 180 days, or the system detects malware on your PC, your account will be locked automatically and you will not be able to access it.

What you can do to help

- If you change your address or other contact details, please let us know as soon as possible and provide evidence, such as a utility bill, to enable us to complete our reverification checks.
- If you change or stop using the services of your financial adviser, please let us know, so that we can update our records and prevent your information being sent out erroneously.
- Never disclose security details such as your Premier Miton account number to an unknown party. If you know or believe that your identity or your account information have been stolen, please call us as soon as possible, or contact the Financial Conduct Authority (FCA).
- If you do receive any correspondence relating to your account, particularly changing your personal details that you did not initiate, please contact us immediately so we can investigate this further.
- If we request information from you to support our management of your investment or account, please provide it as quickly and accurately as possible to prevent any unnecessary delays in processing requests.
- Visit the FCA's website for more information about how to help protect yourself from fraud. Their 'Be a ScamSmart investor' webpage provides further details about what you should do to protect yourself and what action to take if you believe you have been a victim of fraud. fca.org.uk/scamsmart
- Don't assume an email, text or phone call claiming to be from Premier Miton is authentic. We would recommend that you check the FCA register to confirm the details are correct. DO NOT click on email links or call telephone numbers that look unusual.

Take Five is a government backed, national campaign that offers straight-forward and impartial advice to help everyone protect themselves from preventable financial fraud. For further details of the advice on offer, please visit takefive-stopfraud.org.uk



Above all, please remain vigilant. Fraudsters often try to impersonate firms like Premier Miton Investors, cloning logos and setting up fake email accounts or websites. It is always worthwhile carefully checking the web address and email details on any correspondence received to ensure they are genuine. If you are in any doubt about what you should do, or if you have concerns regarding your investment information, please get in touch.

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