

12 November 2024

Dear [Customer Name]

Re: Merging business of Orca Financial Limited - Central Bank of Ireland Registration C35872 with NFP Ireland Consultants Ltd (NFPIC) - Central Bank of Ireland Registration C42649

We are writing to you as a deferred member of a pension scheme in the agency of Orca Financial Limited. As a deferred member, we are required to notify you that in February 2025, subject to regulatory approval, we will be combining our business with NFP Ireland Consultants Limited (NFP IC). This move is to reflect us becoming part of the bigger NFP group which we joined in 2024.

What will and won't change?

We'll be changing our website and email address, documentation will contain the NFP brand, and the company name on our correspondence will change. Our previous email addresses and website will automatically redirect to the new ones.

While this is key milestone, the Orca Financial team, and our core values, remain the same. All our clients, including deferred pension scheme members, will migrate across to NFP IC, subject to regulatory approval. As part of this process, your details will be transferred to NFP IC. If you have access to an insurance provider portal, please be assured that there will not be any changes to how you currently access this.

NFP IC's Terms of Business and Privacy Policy is available at nfpireland.ie/terms-of-business. With effect from 1st February 2025 these will replace the equivalent documents that were supplied by Orca Limited at the outset of your engagement.

What you need to do?

Under the Consumer Protection Code, we are required to provide you with at least 60 days' notice of this transfer of business. The migration to NFP IC will be completed on or soon after the 60-day period from the date of this letter. You do not need to do anything, and we will write to you closer to the change with further information. You do have the right to object to the transfer of your business; if you wish to object, please contact me on benefitsrebrand@nfpireland.ie to discuss your options.

Looking to the future

If you have any questions about these changes, please do not hesitate to contact me – I would be very happy to talk through any queries you have.

Registered Head Office:

1st Floor, Unit 8, Leopardstown Business Park, Dublin 18


T: (01) 2103030 E: info@orca.ie W: www.orca.ie

Orca Financial is regulated by the Central Bank of Ireland. Registered in Ireland, Registration Number 389640.

Directors: John Molloy, Stephen Byrne & Sarah McGurrin

Yours sincerely,

John Molloy

A handwritten signature in black ink, appearing to read 'John Molloy', written in a cursive style.

John Molloy
Managing Director

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