For advisers

Our **new** platform

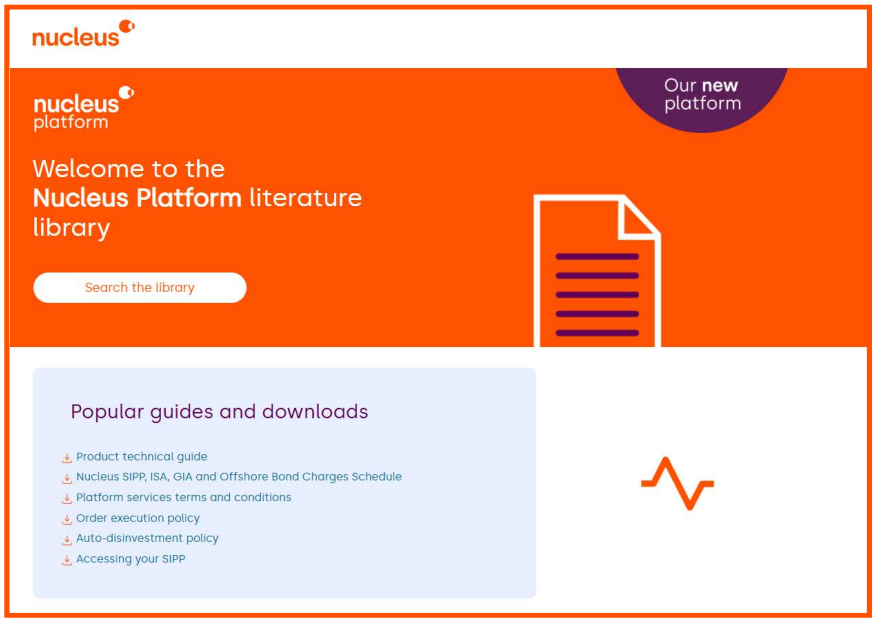
nucleus platform

Offline processes overview

While the majority of journeys can now be completed directly on our new platform online, a small number of processes still need to be submitted to us using an application form.

You'll be able to get these forms from our Literature library.

Please note, whilst we do still accept forms by post, the quickest way for you and your clients to send these to us is by secure messaging.



For more information about how to use our secure messaging app, please see the helpsheet on our website.

Investment selection and management

Process	Form title
Investment Manager set up	Investment manager account opening form
Trading complex products - SIPP	Instruction to trade form (SIPP)
Trading complex products - GIA, ISA, Offshore Bond	Instruction to trade form (non-SIPP)

Additional contributions and transfers

Process	Form title
Top up, single payment - Offshore Bond, individuals, trusts and companies	Offshore Bond payment in
Editing a regular payment - SIPP (employer/third party)	SIPP contribution form

Withdrawals from non-SIPP products

Process	Form title
Single and regular withdrawals from Offshore Bond	Offshore Bond withdrawal

Client servicing

Process	Form title
Change of personal details, tax residency and nationality	Personal details update
Adding interested parties	Third party authority

Divorce and Power of Attorney

Process	Form title
Divorce	Pension credit transfer form Disqualifying pension credit form
Power of Attorney	Power of attorney

Transfers out

Process	Form title
Transfer out- SIPP, JSIPP, Flexi SIPP	SIPP transfer out

If you can't find a particular process either here or as a guide elsewhere on the website, please contact us.

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For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.

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