



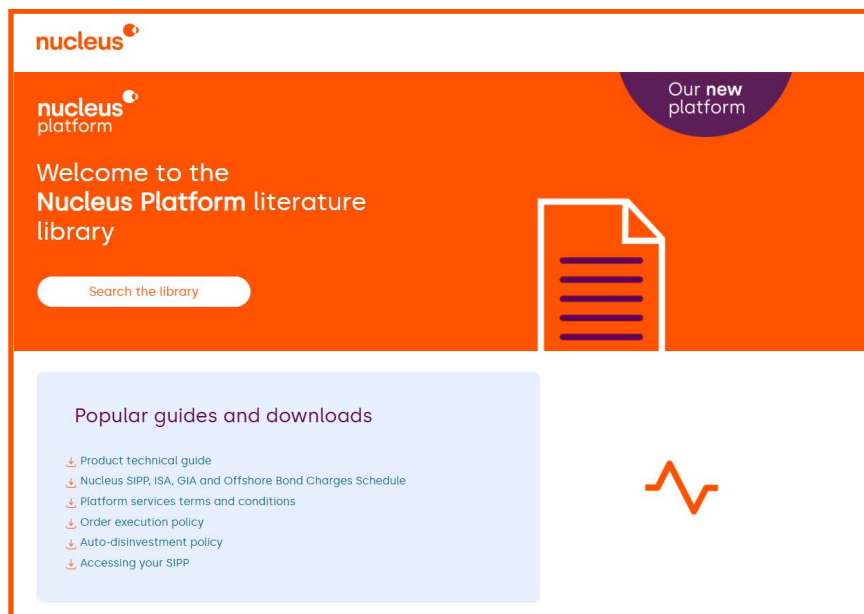
## Offline processes overview

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

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



Please complete the form in **BLOCK CAPITALS** and either return it to the postal address provided on the form or send it to us electronically via secure message.



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

This helpsheet will highlight some of the key processes you'll need an application form for.

## 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 only
Trading complex products - GIA, ISA, Offshore Bond	Instruction to trade form - GIA, ISA, Offshore Bond only

## Additional contributions and transfers

Process	Form title
Top up, single payment - Offshore Bond, individuals, trusts and companies	Offshore Bond payment in form
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 form

## Client servicing

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

## Divorce and Power of Attorney


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


## Transfers out


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



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

 03455 212 414

 [ask@nucleusfinancial.com](mailto:ask@nucleusfinancial.com)

 [nucleusfinancial.com](https://nucleusfinancial.com)

**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.**

"Nucleus" is the trading name for Nucleus Financial Platforms Limited (NFPL) (registered in England, number 06033126), Nucleus Group Services Limited (NGSL) (registered in England, number 02538532); James Hay Services Limited (JHS) (registered in Jersey, number 77318); James Hay Administration Company Limited (JHAC) (registered in England, number 04068398); James Hay Pension Trustees Limited (JHPT) (registered in England, number 01435887); James Hay Wrap Managers Limited (JHWM) (registered in England, number 04773695); James Hay Wrap Nominee Company Limited (JHWNC) (registered in England, number 07259308); Nucleus Financial Services Limited (NFS) (registered in England, number 05629686). NFPL, NFS, NGSL, JHAC, JHPT, JHWM, JHWNC have their registered office at Suite B & C, First Floor, Milford House, 43 55 Milford Street, Salisbury, SP1 2BP. JHS has its registered office at Aztec Group House, IFC6, The Esplanade, St Helier, Jersey, JE4 0QH. JHAC, JHWM and NFS are authorised and regulated by the Financial Conduct Authority. NFPL, NGSL, NFS, JHWM, JHPT, JHAC and JHS are members of a VAT group with VAT registration number 514 0358 80. All companies are wholly owned subsidiaries of NFPL. Further details of the Nucleus Group can be found at [nucleusfinancial.com](https://nucleusfinancial.com) (12/25)