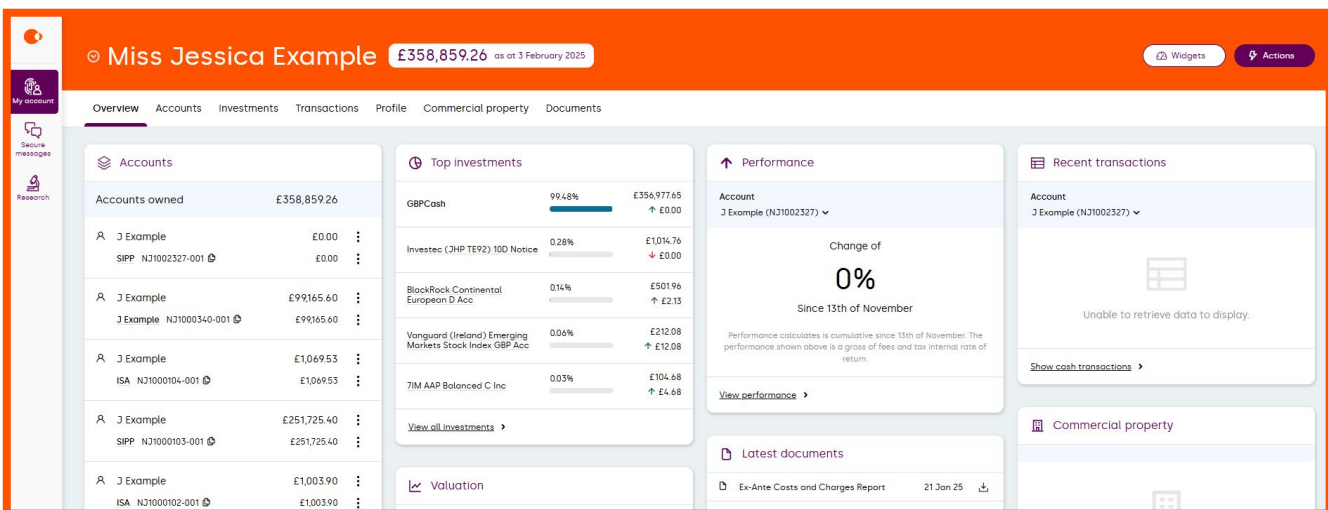




Customer portal permissions

Customer home page

The customer will see a version of this when they log into their portal.



Customer portal access

Customer portal access can be provided to your client through the new business journey or by contacting Nucleus. The customer will be issued with log in details and will be prompted to complete the online registration.



Customer portal access is needed for paperless correspondence. The customer will receive paper documents until the registration is completed.

Key message

All non-advised clients and staff accounts will have access to the portal as default.

Actions customers can complete online

- Open an additional product GIA, ISA, JISA (registered contact)
- Amend client details:
 - Residential address
 - Correspondence address
 - Correspondence preference
 - Telephone numbers
 - Email address
 - Password
 - Memorable picture and phrase
- Add bank details
- Make a single payment
- Set up and amend regular payments (at least eight working days in advance)
- Request a single withdrawal
- Set up regular withdrawals/income
- Change distribution payment options:
 - Reinvested in their account
 - Held as cash
 - Paid to their nominated bank account (non-SIPP)
- Switch and redirection (only available where the adviser has enabled online)
- View documents and messages
- Edit income from crystallised funds

Actions customers cannot complete online

- Top up offshore bonds
- Amend client details:
 - Full name
 - Date of birth (DOB)
 - Nationality
 - National Insurance Number
 - Bank details
- Withdrawals are not permitted for joint accounts, or where the user is only a role holder
- Withdrawals for SIPPs, junior products and joint accounts
- New crystallisation event without advice



All functionality is available for a client at the adviser's discretion.

Clients can open an additional product if they have existing business on the platform and they have received financial advice.

Key message


All payments submitted by the customer are authenticated by two factor authentication, via a code sent to the customer's registered mobile number.

Customer transaction settings


Our admin team can amend the customer transaction capability settings at your Network and Firm level. When we create your network, we can set the client permissions to be able to access or limit the access for the below.

Products	Actions
SIPP	Payments in
ISA	Payments out
GIA	Trades
Offshore bond	

If you'd like a specific client to have a different setting than the default for your network, e.g. turn off the ability to trade, then please contact us and one of our administrators can do that for you.

 03455 212 414

 ask@nucleusfinancial.com

 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.

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