

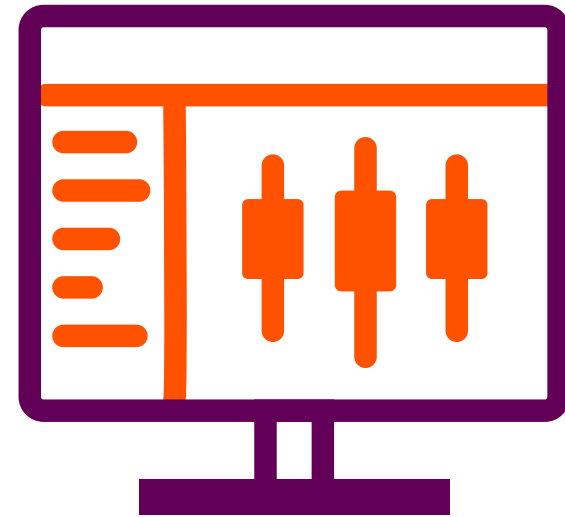
For advisers

Our new
platform

nucleus^o platform

How to register a dual running user

🕒 2 minute read



How to register a dual running user

Logging into James Hay Online	3
New Platform registration	5
Registration email	6

How to use this document



Important information will look like this.

Key messages

Key messages will look like this.



Useful info will look like this.



We recommend using the zoom function to view the details on the platform screens in this guide.

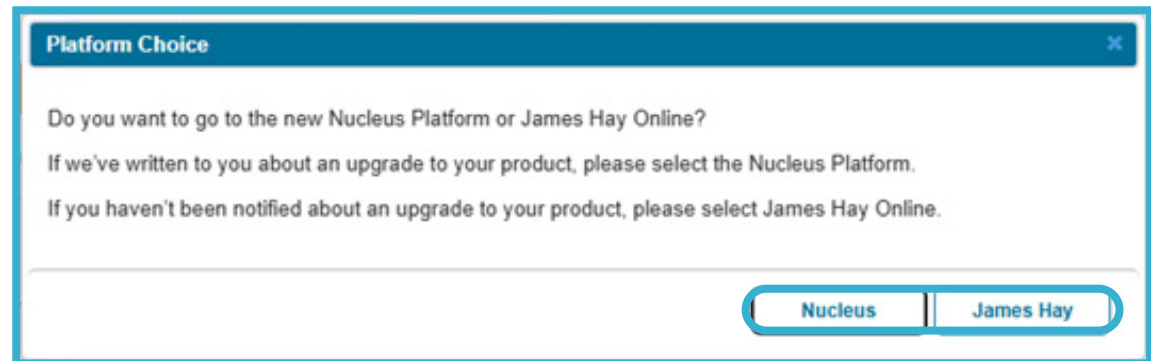
Logging into James Hay Online

To register a dual running user (with plans migrating onto the new Nucleus platform and staying on JHOL), log into James Hay online (JHOL) secure portal.

The screenshot shows the James Hay Online - Secure Portal interface. At the top left is the James Hay Partnership logo. Below it is a blue header bar with the text "James Hay Online - Secure Portal". The main content area is divided into two columns. The left column is titled "Login" and contains three input fields: "Username", "Password", and "Passcode". Below the "Password" field is a "Show password" link, and below the "Passcode" field is a "Show passcode" link. At the bottom of the login box is an orange "Login" button and a "Forgot password/passcode?" link. The right column is titled "Online Registration" and contains two buttons: "Investor" and "Adviser". Below the "Investor" button is the text "Register to manage your existing products." Below the "Adviser" button is the text "Why register? Register to apply, illustrate or manage your existing products - find out more". At the bottom of the page, there is a "Please note:" section with two bullet points: "• Your password and passcode are case-sensitive." and "• By logging in you are agreeing that you have read and understood our [Legal Information](#)."

Select '**Nucleus**' to register for access to the new Nucleus Platform.

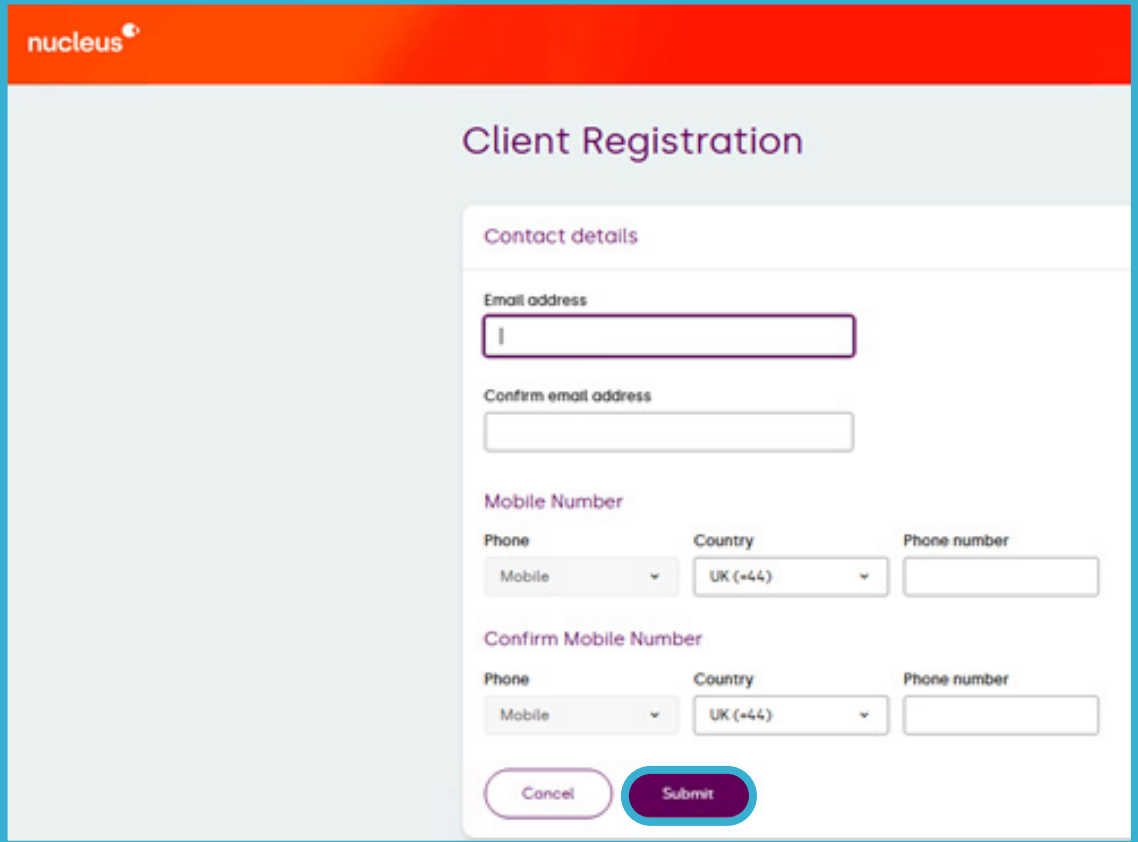
Selecting '**James Hay**' will redirect you to the JHOL welcome page.



New Platform registration

Enter your contact details.

Select '**Submit**'.

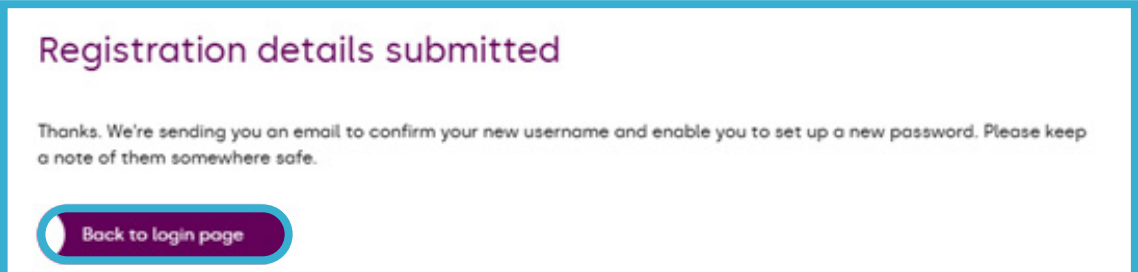


The screenshot shows the 'Client Registration' form on the Nucleus platform. The form is titled 'Client Registration' and is set against a light blue background with a red header bar containing the 'nucleus' logo. The form is divided into two main sections: 'Contact details' and 'Confirm Mobile Number'. The 'Contact details' section includes an 'Email address' field with a cursor, a 'Confirm email address' field, and a 'Mobile Number' section with three sub-fields: 'Phone' (set to 'Mobile'), 'Country' (set to 'UK (+44)'), and 'Phone number'. The 'Confirm Mobile Number' section mirrors these fields. At the bottom of the form are two buttons: 'Cancel' and 'Submit'.

A confirmation of registration will appear.

Keep an eye on your emails for your log instructions.

Selecting '**Back to login page**' will take you to the platform log in page.



The screenshot shows the 'Registration details submitted' confirmation page. The title is 'Registration details submitted' in a purple font. Below the title is a message: 'Thanks. We're sending you an email to confirm your new username and enable you to set up a new password. Please keep a note of them somewhere safe.' At the bottom of the page is a purple button with the text 'Back to login page'.

Registration email

Select the hyperlink 'here' on the email.

Key information

The link on the email is valid for 5 days, after 5 days you'll need to contact us to complete your registration.



Dear Mr Pike

You've registered for online access to the Nucleus Platform.

1. Please click [here](#) to complete your registration and activate your account. The registration link will be valid for 5 days, after that you'll need to contact us on the number below to complete your registration. The first time you log in your username will appear on screen, and you'll be asked to create a new password.
2. Once your password is set up and confirmed, you'll receive a one-time passcode via SMS. Please enter the passcode to complete the setup of your online account.
3. You'll be asked to review and accept our platform Terms of Use policy. You won't be able to access the service until you have done this.

If you haven't requested online access to your Nucleus Platform account, or have any questions, please call us on 03455 212 414 or email us at ask@nucleusfinancial.com.

Customer Service Team

This email and any attachments to it are confidential and may be privileged. If you're not the intended recipient of this e-mail, any disclosure, distribution, copying or use of it (including attachments) is strictly prohibited, and you should notify the sender immediately and delete it (including attachments) from your system. E-mails aren't always secure and may be intercepted or changed. We don't accept liability if this happens. If you believe that this e-mail has been interfered with, please contact the sender another way. We don't accept liability for any losses caused by any virus contained in this e-mail or its attachments. This message doesn't create or change any contract. We don't accept service of court or tribunal proceedings by e-mail without prior written agreement.



Keep note of the username displayed. You'll need this to log in to the platform. If you need your username, contact the master user at your firm.

Enter your new password into both fields.



Your password must meet these requirements:

- Minimum eight characters, maximum 50
- Contains at least two numbers (0 - 9)
- One upper case letter
- Remaining characters can be lower case, but not special characters
- Does not repeat the same character more than twice in succession
- Password history is set to record last 13 passwords

Select **'Save'**.

Register

Your username is:
dpike113
Please keep a note of this somewhere safe

Please enter your chosen password below and confirm it.

New password

[Show password](#)

Confirm new password

[Show password](#)

Your password needs to meet these requirements:

- Password length is between 8 and 50 characters
- Contains 2 or more digits
- Contains 1 or more upper case letters
- Contains 1 or more lower case letters
- Does not contain any special characters
- Does not repeat the same character more than twice in succession
- Is not one of the 13 most recently used passwords

Save

Contact details

Your email is: [REDACTED]

Your mobile number is: [REDACTED]

A one-time password (OTP) code will be sent via SMS to the phone number you've provided.

Enter the OTP code.

Select '**Next**'.

Register

Please enter your one-time password
OTP code sent by sms to +44 **** * 532

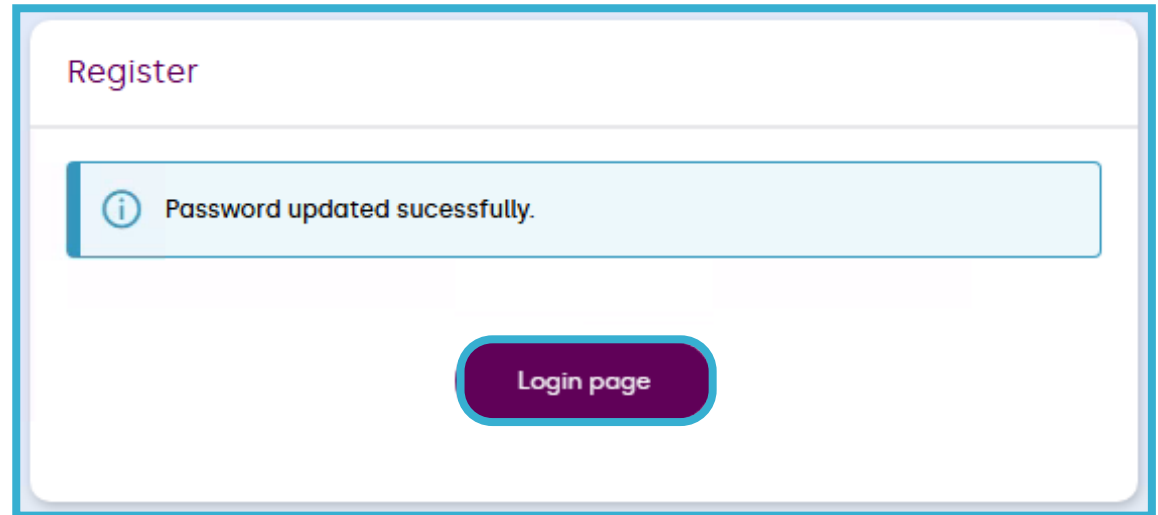
It can take up to a minute for the text message to reach you.
Haven't received it?

[Back](#) [Next](#)

If you'd like help, please call our Customer Service Centre team on 03455 212 414.

Your registration has been submitted successfully.

Select '**Login page**', to go to the platform log in page.



Enter your username and password.
Select '**Login**'.

nucleus
platform

Our new platform

Our brand-new Nucleus Platform is being trialled by a small number of ex-James Hay users. If you're one, this is the login you need. If you're looking for the original Nucleus Wrap platform or James Hay Online, please select the relevant platform login below.

User ID [Forgotten your User ID?](#)

Password [Forgotten your password?](#) [Show password](#)

[Login](#) [Register for online access](#)

JAMES HAY
PARTNERSHIP

Login for James Hay online.

[Login](#)

nucleus

Login for the original Nucleus Wrap platform – this isn't our new platform that will replace James Hay.

[Login](#) [Nucleus Go](#)

You'll be presented with the new platform terms and conditions.

Read the terms and conditions, select 'I agree' to proceed.

where amended by third parties.

5. Instructions

Where instructions are submitted using the Service, we may refuse to act where we consider the instructions to be unclear, if we doubt their authenticity, or if we suspect the instruction may place us in breach of law, or that it may relate to fraud or any other criminal act. If we refuse to act on your instruction, we'll notify you and, where permitted, explain the reason why we refused.

6. Revoking access

We reserve the right to revoke online user access for a customer, financial adviser and/or appointed representative as we consider appropriate. For example, this could be where there is a change to the access rights of a user, or where we suspect that the security of an account has been compromised and we wish to protect your firm and clients from potential harm.

7. Availability/alteration of Service

Access to our Service depends on our own systems' availability, and that of third party systems. Please refer to the product's Terms and Conditions for details of how we may manage interruptions to the Service and how this may affect your use of it.

We may amend, extend or withdraw any elements of the Service at any time. We will notify you of changes to the Service if we believe them to be material changes.

Please select one of the options below:

I agree I do not agree

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, 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.

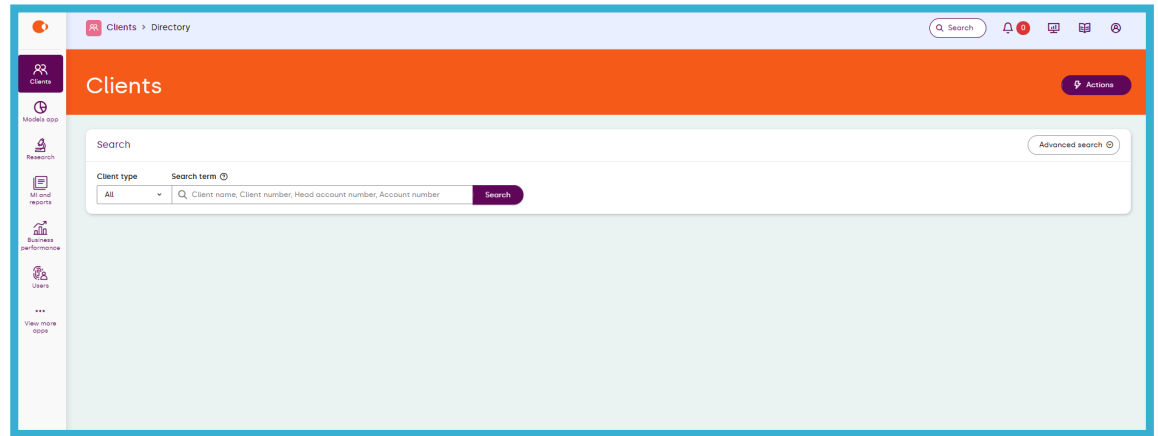
JHS has its registered office at Aztec Group House, IFC6, The Esplanade, St Helier, Jersey, JE4 0QH.


JHAC, JHWM and NFS are authorised and regulated by the Financial Conduct Authority.

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 (12/24)

You've successfully registered to the new Nucleus platform.



 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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