

For advisers

Our new  
platform

# nucleus<sup>o</sup> platform

## How to add and amend an expression of wish

 1 minute read



## How to add and amend an expression of wish

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### 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.

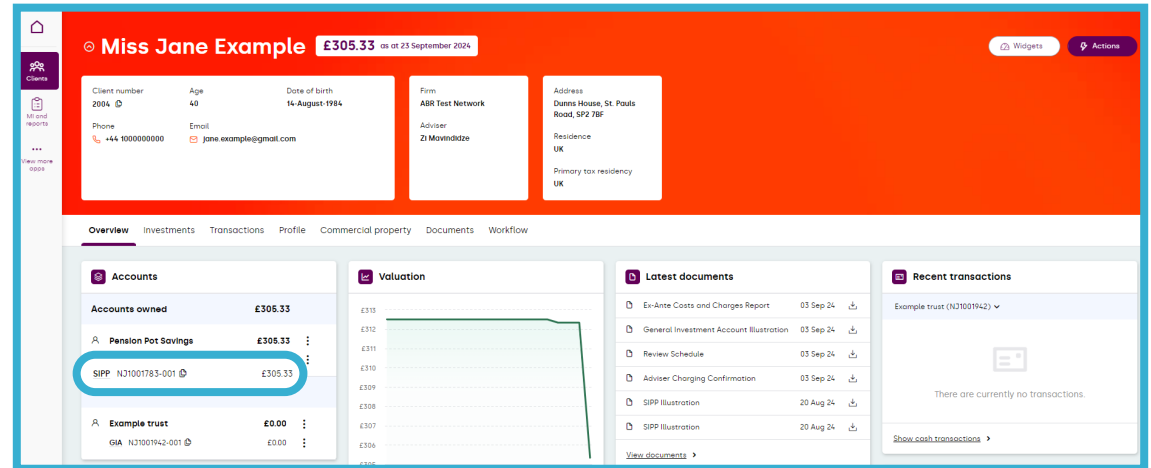


We recommend using the zoom function to view the details on the platform screens in this guide.

## How to add and amend an expression of wish

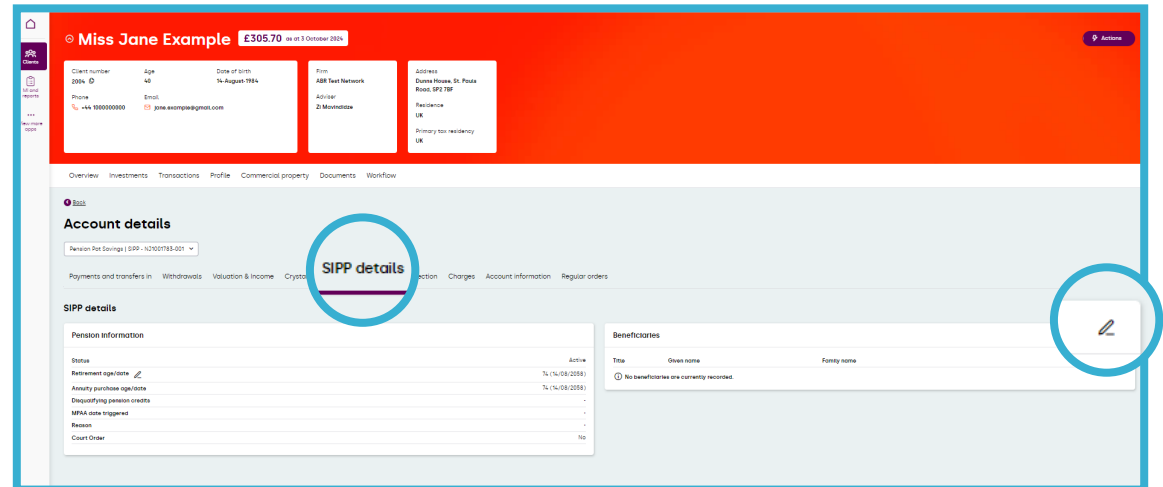
To add and amend an expression of wish, you first need to find your client. You can refer to our guide to help you search for your client on our Help Hub.

Select the 'SIPP' account from the accounts widget.



From the account details page select 'SIPP details'.

To add a new beneficiary, select the 'pencil icon' on the beneficiaries section.



To add a beneficiary, select **'Add beneficiaries'**.

Select the beneficiary's title from the drop-down list and enter the beneficiary's details.

Enter a percentage allocation for each beneficiary - ensuring the total equal 100%.

### Key message

To delete the beneficiary, select the trash icon.

Once you're happy with the beneficiary details, select **'Update'**.

Title	First name	Family name	Allocation	
Mr	andrew	taylor	50	%
Ms	julie	taylor	50	%

[+ Add beneficiaries](#)

Cancel


Update

The beneficiary details have been updated and will now show on the screen.


The screenshot displays a financial dashboard for a client named Miss Jane Example. The top navigation bar is red and contains the client's name, a balance of £305.33, and the date 09:01 23 September 2024. Below this, there are three white boxes containing client details: Client number (2004), Age (40), Date of birth (14 August 1984), Firm (ABR Test Network), and Address (Dune House, St. Pauls Road, SP5 7TF). The main content area is titled 'Account details' and shows the account name 'Pension Pot Savings (SPP - A21007193-001)'. A tabbed interface is visible with 'SPP details' selected. Under 'SPP details', there is a 'Beneficiaries' section with a table showing one beneficiary: 'taylor' with an association of '50'. A blue circle highlights the 'Beneficiaries' section header.

Pension Information	
Status	Active
Retirement age/date	% (%:08:2058)
Annuity purchase age/date	% (%:08:2058)
Default pig pension credits	-
MFAA date triggered	-
Reason	-
Court Order	No

Family name	Association
taylor	50
taylor	50

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