


# Pension top up application form

(Execution only clients)

- ✓ Please use this form if you wish to make single or regular cash contributions to your Pension. These can be personal contributions, or contributions that your employer will be making to your Pension on your behalf.
  - ✓ This process is designed for execution only customers i.e., customers who have not taken advice and who are acting on their own initiative. We would always recommend that you seek regulated financial advice.
  - ✓ We must remind you that progressing on a non-advised basis may affect the regulatory protection you would otherwise be entitled to. For example, you will not have recourse against an adviser firm in regard to investment decisions made by you. Your right to pursue compensation via the Financial Services Compensation Scheme is not affected when we execute a transaction for you on a non-advised basis.
-  If anyone forgets to add a date to their signature, we'll treat the day we receive this form as the signing date.

Once this form has been completed and signed, please send it to us at the below address.

 Nucleus, PO Box 26968, Glasgow, G2 9DY  0131 226 9535 Option 1  [client.relations@nucleusfinancial.com](mailto:client.relations@nucleusfinancial.com)



## Are you still eligible to contribute to your pension?

To qualify for tax relief, you must be under age 75, resident in the UK and you must have available personal annual allowance or within the MPAA.

### Customer details

Name

Nucleus reference number (if known)

Account number

N



We aren't authorised to provide financial advice, so we can't provide you with any recommendations or guidance on topping up your pension.

If you need help, please speak to an FCA authorised adviser.

Please note: Contributions to our Pension must cease by age 75.

## Contributions

### Entitlement to tax relief

Please tick one option only:

- i. I have relevant UK earnings chargeable to income tax, or general earnings from overseas Crown employment subject to UK tax, in this tax year.
- ii. I am, or have been, resident in the UK at some time during this tax year.
- iii. My spouse or civil partner has for this tax year general earnings from overseas Crown employment subject to UK tax.
- iv. I am, or my spouse or civil partner is, in overseas Crown employment but for this tax year do/does not have general earnings from overseas Crown employment subject to UK tax.
- v. I was resident when I became a member of the Pension and have been resident in the UK at some time during five tax years immediately before this tax year.

If you have ticked (i) or (ii), we will reclaim basic rate tax on your personal contributions. If you are liable to income tax at a rate above basic rate, you will be able to claim any additional relief from HM Revenue and Customs (HMRC) either through your self-assessment return or, if you do not complete one, by contacting HMRC.

If you have ticked (iii), (iv) or (v), we will reclaim basic rate tax on your personal contributions up to the basic amount of £3,600 gross.

### Personal contributions

Please state the net amount that you would like to pay into your Pension. If we are able to reclaim basic rate tax on your personal contributions, this tax amount will be added to your stated net contribution amount. Please therefore note that the gross figure (the net amount you are contributing plus the value of any tax reclaim) is the figure used to calculate against your annual allowance or money purchase annual allowance.

Single contribution £ (net)

### Payment method

Electronic bank transfer or General account\*

N

When prompted, please send the payment to the following bank account, quoting your Nucleus Pension N account number as the payment reference:

Payee	Sort code	Account no
Nucleus Trustee Company Limited*	16-04-00	31265985

If the top up is being funded by the General account and there is insufficient cash in your account, please complete the sell down section of this form to make cash available.

\* While The Nucleus Trustee Company Limited entity is currently dormant as a Company, The Nucleus Trustee Company Limited bank account, which acts as a trustee, is active and open to accept payments.

Regular contribution £ (net)

### Frequency of contributions

Monthly      Quarterly      Half yearly      Annually

Collection date for the contributions (this must be between 1st-28th of the month)

If no start date is provided, we will set up the Direct Debit for the first of the month following the date that this form is signed.

If regular contribution payments are to be made to your Pension, please also complete the [Direct Debit Mandate](#), and send it to Nucleus. Please allow at least 10 business days for us to set up any Direct Debits.

If applicable, we will reclaim basic rate tax on personal contributions.

Important: If your contributions in respect of a tax year exceed the annual allowance (£60,000 for the 2026/27 tax year), then you may be subject to an annual allowance tax charge. It is possible for unused annual allowance to be carried forward for up to three years. You should speak to a financial adviser about this.

## Money Purchase Annual Allowance

If you have flexibly accessed your Pension or any other money purchase pension you may have, you will be subject to the money purchase annual allowance (MPAA) limit (£10,000 for 2026/27 tax year). If your contributions exceed this amount, you may be subject to an annual allowance tax charge. You can find information on MPAA on the Moneyhelper website [here](#).

Are you subject to the Money Purchase Annual Allowance MPPA?

Yes      No

I acknowledge that if I am subject to the money purchase annual allowance I may be liable to tax charges if my pension contributions to money purchase schemes exceed £10,000 in a tax year.

## Source of wealth

Please tick one or more of the following options to indicate from which source(s) you have accumulated the personal wealth that will be used to fund your Pension.

Income from employment	Property sale
Income from savings/investments	Inheritance
Gift	Divorce settlement
Lottery and other winnings	Other (please specify)

### Employer contributions – employer contact details (if applicable)

Company name

Company address

Country of establishment/incorporation

Registered number

Nature of business

Contact number

Please note: where required we will correspond with your employer in relation to your Pension contribution(s).

If your employer wishes to regularly contribute to your Pension, please ask them to complete and sign this form. They will also need to complete the [Direct Debit Mandate](#) and send it to us. Please allow at least 10 business days for us to set up any Direct Debits.

### Employer contribution – single payments (if applicable)

All employer contributions are paid gross. How much will your employer pay into your Pension?

Single contribution £ (gross)

Payment method

Electronic bank transfer

When prompted, please send the payment to the following bank account, quoting your Nucleus Pension N account number as the payment reference:

Payee	Sort code	Account no
Nucleus Trustee Company Limited*	16-04-00	31265985

\* While The Nucleus Trustee Company Limited entity is currently dormant as a Company, The Nucleus Trustee Company Limited bank account, which acts as a trustee, is active and open to accept payments.

### Employer's regular contributions (if applicable)

You, the employer, should complete this section if you will be making regular payments into your employee's Pension, either deducted from the employee's salary, or from your own funds. Regular payments must be submitted via Direct Debit. You, the employer, must prepare and maintain a record of the payments due to be paid to your employee's Pension.

Regular employer contribution amount\* (including salary sacrifice arrangements)

£ (gross)

Regular employee contribution amount\*\*

£ (net)

\* Please note that employer contributions to your Pension (including salary sacrifice arrangements) are paid gross.

\*\* Employee contributions paid from your taxed income should be paid net of tax. If we are able to reclaim basic rate tax on your personal contributions, this tax amount will be added to your stated net contribution amount. Please therefore note that the gross figure (the net amount you are contributing plus the value of any tax reclaim) is the figure used to calculate against your annual allowance or money purchase annual allowance.

Frequency of contributions

Monthly      Quarterly      Half yearly      Annually

Collection date for the contributions (this must be between 1st-28th of the month)

If no start date is provided, we will set up the Direct Debit for the first of the month following the date that this form is signed.

If regular contribution payments are to be made to your Pension, please also complete the [Direct Debit Mandate](#), and send it to us. Please allow at least 10 business days for us to set up any Direct Debits.

**To be signed on behalf of the employer**

I confirm that the information in this section is accurate, and I will notify you if any of these details change.

Signed

Print name

Date (dd-mm-yyyy)

— —

Position





## Signature

Signed

Print name

Date (dd-mm-yyyy)

— —

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## Checklist of additional documentation required

### Personal contributions

Direct debit mandate completed for regular contributions

### Employer contributions

Direct debit mandate completed by your employer

Employer regular contributions section signed by your employer

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0131 226 9535, or via the Typetalk service on 18001 0131 226 9535.



0131 226 9535



client.relations@nucleusfinancial.com



www.nucleusfinancial.com