



Investment manager/stockbroker account closing form

Please complete this form in BLOCK CAPITALS and return it by:

- **post** to Nucleus, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB, or
- **secure message** via your online account with us.

If you need any help, please call your Customer Support Team or our general enquiry number 03455 212 414.

Using this form

Please use this form if you wish to close your account with your investment manager/stockbroker.

We will instruct the investment manager/stockbroker to sell your assets and close the account.

The cash proceeds from the sale of your investments will be transferred to your product bank account.

If you wish to appoint a replacement investment manager, please instead complete the **Investment Manager Appointment Form**. You may be able to re-register your assets to them, rather than selling them and transferring cash. The form is available on our website literature.nucleusfinancial.com or on request.

Section 1 - Personal details

Title

Forename(s)

Surname

Product number

Date of birth (DD/MM/YYYY)

Address

Postcode

Telephone/mobile

Email

Section 2 - Investment manager/stockbroker details

Name of the investment manager/stockbroker firm

I accept that Nucleus will rely on the information provided in Section 2 and will forward the information to the investment manager/stockbroker without amendment.

Address

Customer's signature

Postcode

Print name

Account reference number/designation

Date (DD/MM/YYYY)

Please note that we will not consider the account to be closed until we receive written confirmation from the investment manager/stockbroker. If you are closing your Nucleus product, this cannot be completed until your investment manager/stockbroker account has been closed.

OR

Financial adviser's signature
(on behalf of customer)


Section 3 - Customer declaration

I request and consent to the closure of the investment manager or stockbroker account named in Section 2 of this form.


Print name

I accept that if this form is not fully completed, or is in Nucleus' reasonable opinion unclear, Nucleus may reject the instruction and will not be liable for any delays this may cause.

Date (DD/MM/YYYY)

 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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