

# Easy steps to transferring into your client's Nucleus pension

Transferring from one provider to another is easy on Nucleus Wrap. All you have to do is complete the online new business process, send us the application pack and we'll do the rest.

**1** Add the client to the platform, or choose an existing client.

For help with how to add a client, please refer to the [New clients and new business user guide \(0061\)](#).

**2** Select 'top up/add investment'.

**3** Select account type 'Pension' for new accounts or the existing pension account you wish to top up and press the + sign.

**4** Select 're-register' or 'transfer' as the 'contribution type', the annual advice fee and if your client is subject to the Money Purchase Annual Allowance (MPAA).

If instructing a re-registration and residual cash is included, please remember to key a transfer for the cash element.

**5** Select the ceding company from the dropdown menu, input the policy details being transferred and the initial fee to be deducted (cash transfer only). Please note this is the address we'll send your request to and the contact details we'll use to chase the transfer, so please make sure these details are accurate. When keying a re-registration, please ensure the ISIN codes and unit amounts are accurate and match a recent valuation from the ceding scheme to avoid delays. The 'Funds' report on the platform can be used to check if we hold assets prior to keying.

If the ceding company is not on the dropdown list, select 'Other' then manually enter the company name and address.

**6** Select the assets.

You can use a model portfolio, select individual assets or choose from your 'favourite assets' list. For setting up a model portfolio, please see the [Model portfolios user guide \(0319\)](#).

**7** Account specific details.

Add pension beneficiaries (optional) and selected retirement age.

**8** Submit the application.

Before this stage you can illustrate and review the application for accuracy.

**9** Print the system generated, pre-populated forms and send to Nucleus client relations via Jira or in the post. The 'i' button will tell you what these are. Remember to include a copy of the application summary which is printed separately.

Remember to include the [Pension transfer form \(0021\)](#), or where relevant the ceding company's own discharge paperwork. The transfer in can't be instructed until we receive the fully completed paperwork. We will accept these forms on a Jira.



## More information

We accept electronic signatures for new business and client instructions. Take a look at our [e-signatures guide \(0331\)](#). See our [Sending payments to Nucleus, a guide for clients \(0618\)](#) a handy one pager which details our bank account information that you can pass onto your clients.

We can accept scanned documentation via Jira messaging. Please see our [scanned documentation guide \(0534\)](#) for more details. For help with keying a transfer please call your Client Relations Manager or you can speak to us on Live Chat.

## Analysing your clients

Use the 'Pensions contributions' report (available from the [Reports](#) tab) to see your clients' current pension contribution status.



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