

For customers

Our new
platform

nucleus^o
platform

How to edit and
cancel a regular
withdrawal

🕒 4 Minute read



How to edit and cancel a regular withdrawal

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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.

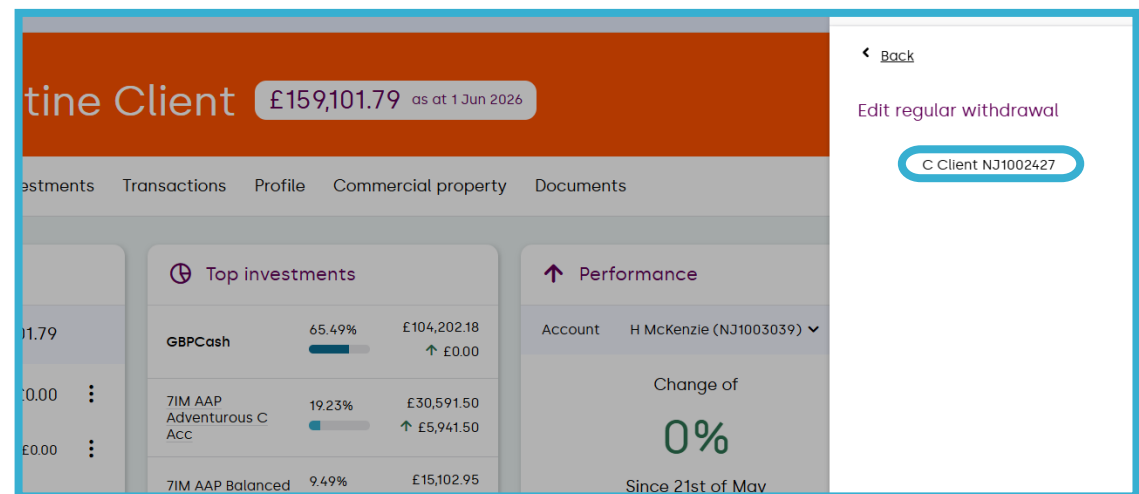
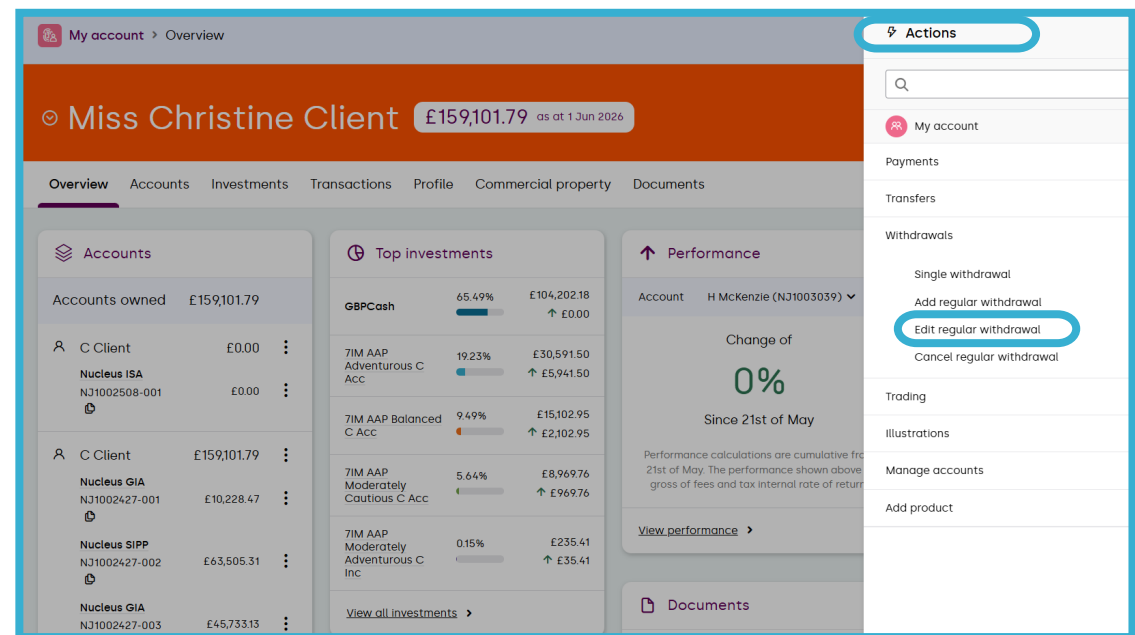
How to edit a regular withdrawal

This process is the same for both a GIA and ISA. This guide follows the steps for a GIA.

Once you've logged into your account, you'll arrive at the overview page.

To edit a regular withdrawal, select the 'Actions' button in the top righthand corner. Under the heading 'Withdrawals', select 'Edit regular withdrawal'.

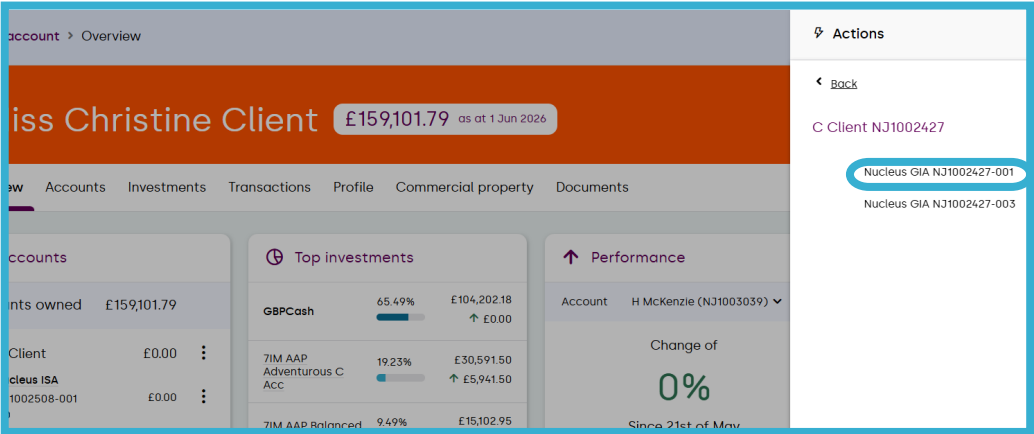
Select the account to edit the withdrawal from.



Select the product to edit the withdrawal from.

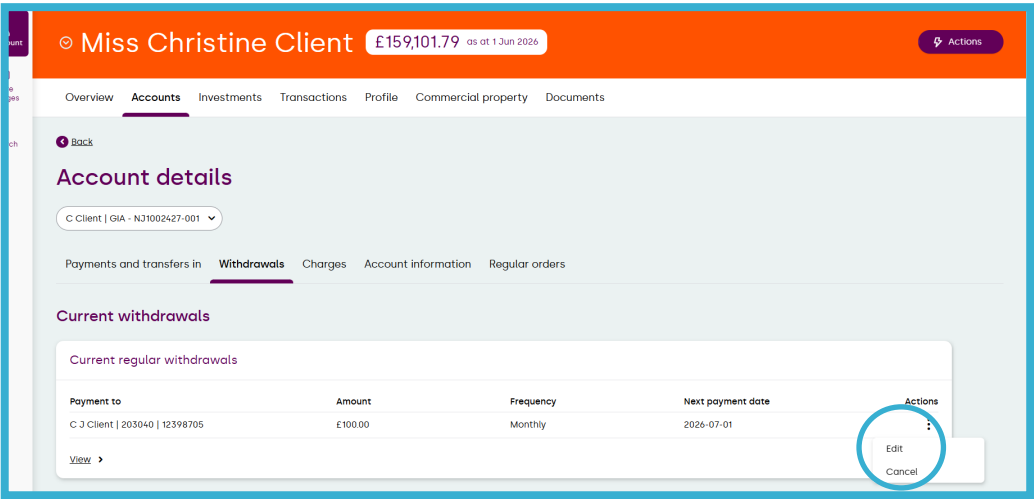


A warning will appear if the regular withdrawal you wish to edit or cancel is currently in progress.



Alternatively, under the tab 'Withdrawals', go to 'Current regular withdrawals'. Here you will see a list of your regular withdrawals.

You can edit the regular withdrawal by selecting the three ellipses under the 'Actions' heading. Then select 'Edit'.



Withdrawal details

Edit the 'Withdrawal amount', 'Frequency' and 'Next withdrawal date'. You can also confirm a 'continue until' date if needed.

Key messages

As a withdrawal is currently in progress, scheduled to be paid on the next withdrawal date, we'll pay both withdrawals even if they're to be paid on the same date.

Check the bank account is correct. You can also add a **payment reference**

You can add an additional bank account back on your overview page, under the 'Profile' tab, and then select 'Bank accounts'.

Edit where the funds will be withdrawn from, either available cash and/or current assets.

Then select 'Continue'.

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Edit regular withdrawal

Withdrawal details

Christine Client

Client ID: 2798

Product reference: N31002427-001

Product: Nucleus GIA

ⓘ

A withdrawal is currently in progress and will be paid on the next withdrawal date. We'll pay this amount as well as any other withdrawal you've requested, even if they're on the same date.

Edit the withdrawal amount

Withdrawal amount ⓘ

£ 50

Withdrawal frequency

Monthly

Next withdrawal date

01/07/2026

ⓘ

The date selected is the earliest date the first withdrawal could be made. If it's not possible to make the payment on this date e.g. due to the investments to be sold, a transfer in has not yet completed, or there's an outstanding client authorisation, the first withdrawal date will roll forward based on the frequency selected. The first withdrawal date will continue to roll forward at the frequency selected until there's a sufficient balance available to make the payment.

Edit regular withdrawal

1. Withdrawal details

2. Review

3. Confirmation

Cancel

Continue

Continue until

Until notified

Payment reference (optional) ⓘ

GIA regular withdrawal

Bank account ⓘ

20-30-40 | 12398705 | Nationwide

Investments to sell

Withdrawal amount monthly

£50.00

Investment name	Available to sell	Estimated amount to withdraw ⓘ	Sell all ⓘ
Cash	£6,743.98	£ 50	☐
7IM AAP Adventurous C Acc	£299.08	£ 0	☐
7IM AAP Moderately Adventurous C Inc	£235.41	£ 0	☐
Total		£50.00	

Edit regular withdrawal

1. Withdrawal details

2. Review

3. Confirmation

Cancel

Continue

Review

Review the edited withdrawal details for accuracy.
You can make any changes using the 'pencil' icons.



If a withdrawal is already in progress, these payment(s) will continue to be made. Subsequent regular withdrawals will be in line with the changes requested.

You can download the product Illustration here under 'supporting documents'.

Once you're happy, Then select '**Submit**'.

Nucleus

Edit regular withdrawal

Christine Client
Client ID: Z798
Product reference: NJ1002427-001
Product: Nucleus GIA

① A withdrawal is currently in progress and will be paid on the next withdrawal date, details are shown below, under the heading 'From' and we'll pay this amount as well as any withdrawal you've requested, under the heading 'To', even if they're on the same date.

Important information

① You have a withdrawal which is already in progress. These payment(s) will continue to be made. For in progress regular withdrawals, the next regular withdrawal will be made in line with the current instructions. Subsequent regular withdrawals will be in line with the changes requested

① If you submit this instruction, the existing regular withdrawal already set up will be cancelled and this new regular withdrawal will be created. If there's an in-flight regular withdrawal, this will still be processed and paid.

Nucleus GIA

Updated withdrawal details

	From	To
Withdrawal amount	£100.00	£50.00

2. Review

3. Confirmation

Cancel

Submit

Investments to sell

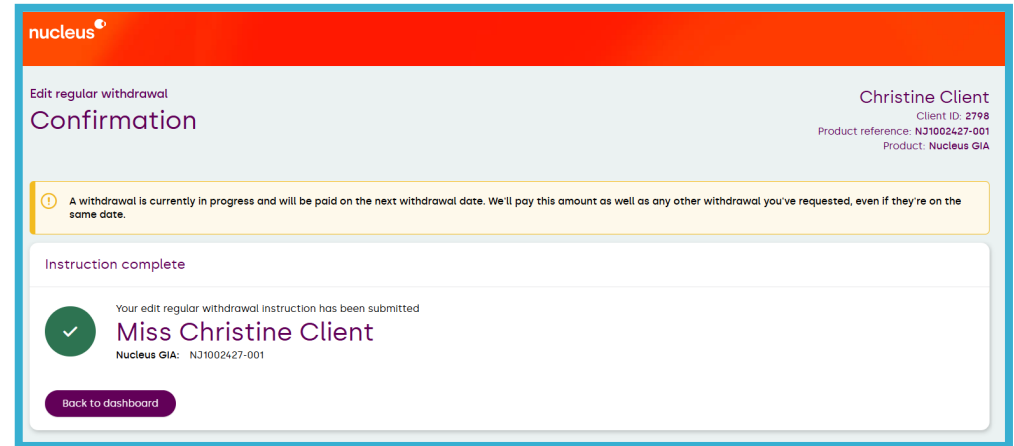
Investment	Old sell value	New sell value
7IM AAP Adventurous C Acc	£0.00	£0.00
7IM AAP Moderately Adventurous C Inc	£0.00	£0.00
Cash	£100.00	£50.00
Estimated net order value ①	£100.00	£50.00

Supporting documents

GIA Illustration

Confirmation

A confirmation message will appear that your regular withdrawal edit instruction has been submitted.



How to cancel a regular withdrawal

To cancel a regular withdrawal, select the 'Actions' button in the top righthand corner of the screen. Under the heading '**Withdrawals**', Then select 'Cancel regular withdrawal'.

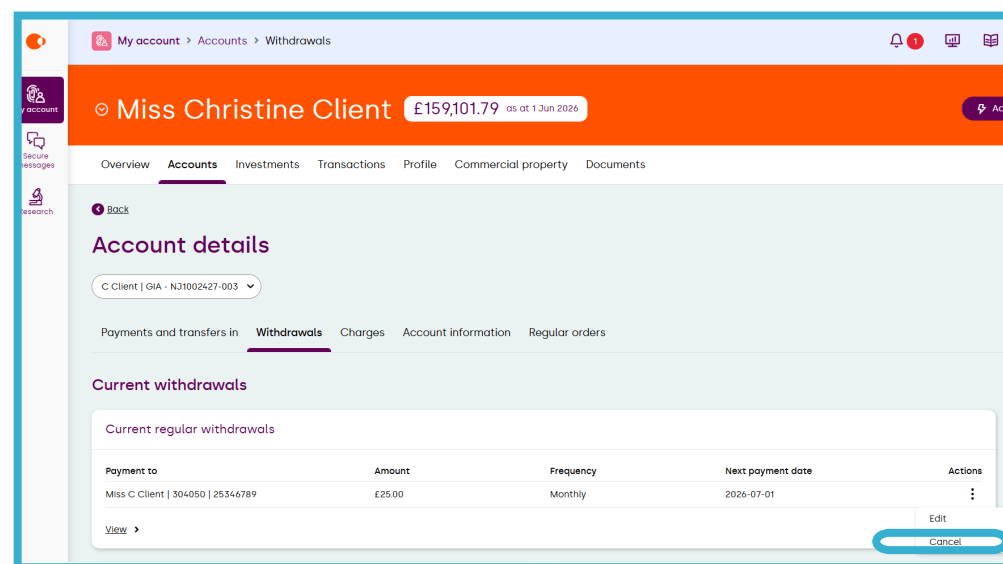
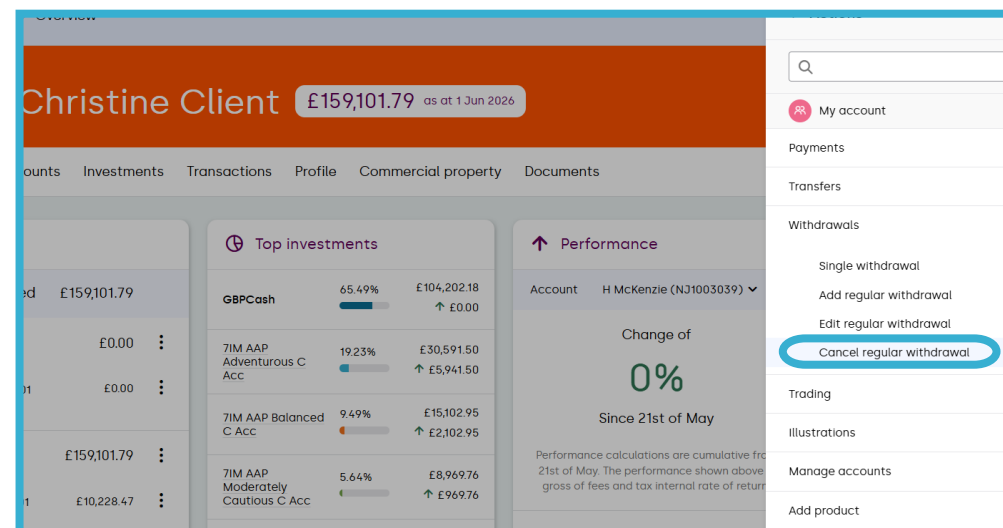
Key messages

Only accounts with existing regular withdrawals will be available to cancel.

All existing withdrawal instructions will appear on the screen.

Alternatively, under the heading 'Withdrawals' tab, go to 'Current regular withdrawals' and the three ellipses under the 'Actions' heading for the chosen product,.

Select '**Cancel**'.



Review

You will be asked if you are sure you want to 'cancel all future regular withdrawals?'

Select 'Yes, I'd like to cancel' to cancel the regular withdrawals or 'No, do not cancel' if you don't want to continue.

The screenshot shows the 'Review' stage of a process to cancel regular withdrawals. At the top, the Nucleus logo is on the left, and client information is on the right. The client's name is Christine Client, with ID 2798. The product reference is NJ1002427-003, and the product is Nucleus GIA. The main heading is 'Review'. Below this, a question asks if the user is sure they want to cancel all future regular withdrawals. A table displays the current withdrawal details: Amount (£25.00), Withdrawal frequency (Monthly), Bank account (30-40-50 | 25346789), and Next withdrawal (01 Jul 2026 00:00:00). At the bottom, there are two buttons: 'Yes, I'd like to cancel' (highlighted with a blue border) and 'No, do not cancel'.

nucleus

Cancel regular withdrawals

Christine Client
Client ID: 2798
Product reference: NJ1002427-003
Product: Nucleus GIA

Review

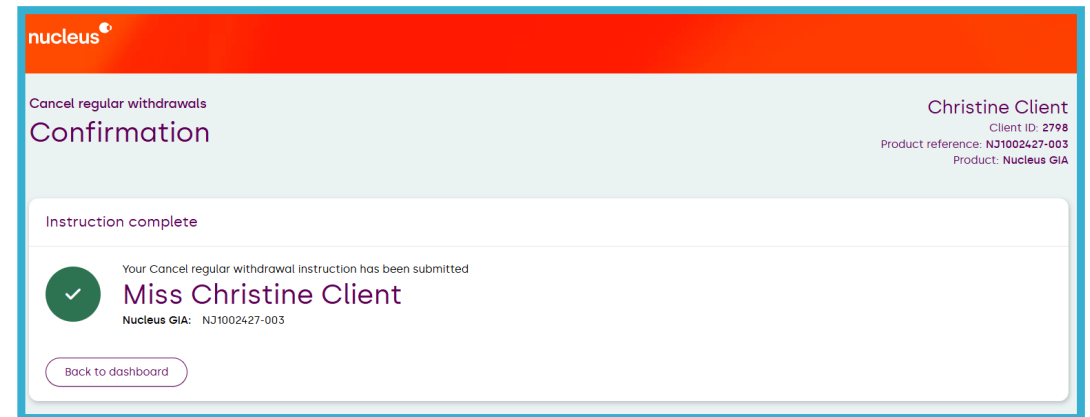
Are you sure you want to cancel all future regular withdrawals?

Amount	£25.00
Withdrawal frequency	Monthly
Bank account	30-40-50 25346789
Next withdrawal	01 Jul 2026 00:00:00

Yes, I'd like to cancel No, do not cancel

Confirmation

A confirmation message will appear stating that you have cancelled the regular withdrawals, and the instruction has been submitted.



If you have any questions, please contact us on
03455 212 414.

 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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