



Joint to individual GIA 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.

Please use this form if you wish to split an existing Nucleus Joint GIA held by two people into two individually held Nucleus GIA products.

Though the assets in the Joint GIA may typically be owned equally, each individual's entitlement may vary, and the tax consequences can be significant. You should speak to your adviser before completing this form.

Section 1 - Reason for change

Nucleus Joint GIA number

Dissolution of Joint GIA

Death of a customer

If a Nucleus customer has died, please contact us to discuss your requirements.

Section 2 - Joint GIA customers

Customer 1

Title

First name(s)

Surname

Date of birth (DD/MM/YYYY)

Customer 2

Title

First name(s)

Surname

Date of birth (DD/MM/YYYY)

Section 4 - Declaration

By signing this declaration, we apply to close our existing Joint GIA product and transfer all holdings into new GIA products held individually.

We apply to Nucleus Financial Services Limited to open individual GIA products, therefore ending any joint ownership of assets in the existing Nucleus Joint GIA.

We agree for the assets to be split as stated in Section 3, and we accept that in doing so, we forfeit our rights to the proceeds that are not transferred into a GIA in our own names.

We confirm that Nucleus has not provided any form of advice nor influenced this change of Nucleus product in any way. Any tax, investment or financial advice we are following has been provided by appropriately regulated advisers.

We are aware of the implications of re-registering or selling these assets, and accept that we are fully responsible for any third party charges (including any taxes) that may arise as a result of this request.

We have read, and agree to be bound by, the **Nucleus Platform Terms and Conditions**, the **Charges Schedule**, and the **Permitted Investments List for the Nucleus GIA**.

Customer 1

Signature

Print name


Date of birth (DD/MM/YYYY)

Customer 2

Signature

Print name

Date of birth (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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