

For customers

Our new
platform

nucleus^o platform

Pension servicing

🕒 3 minute read



Pension servicing

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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.

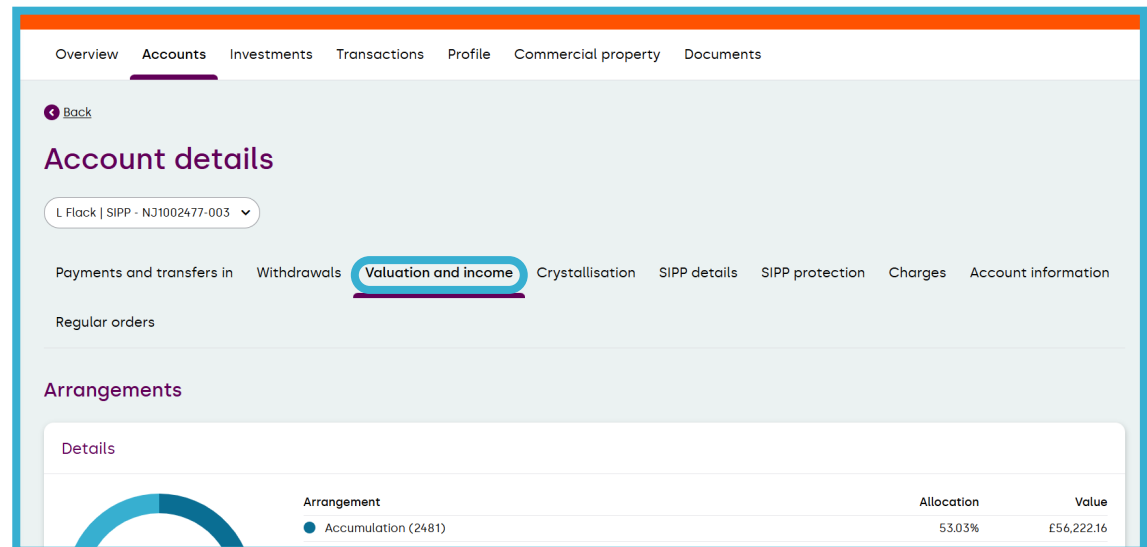
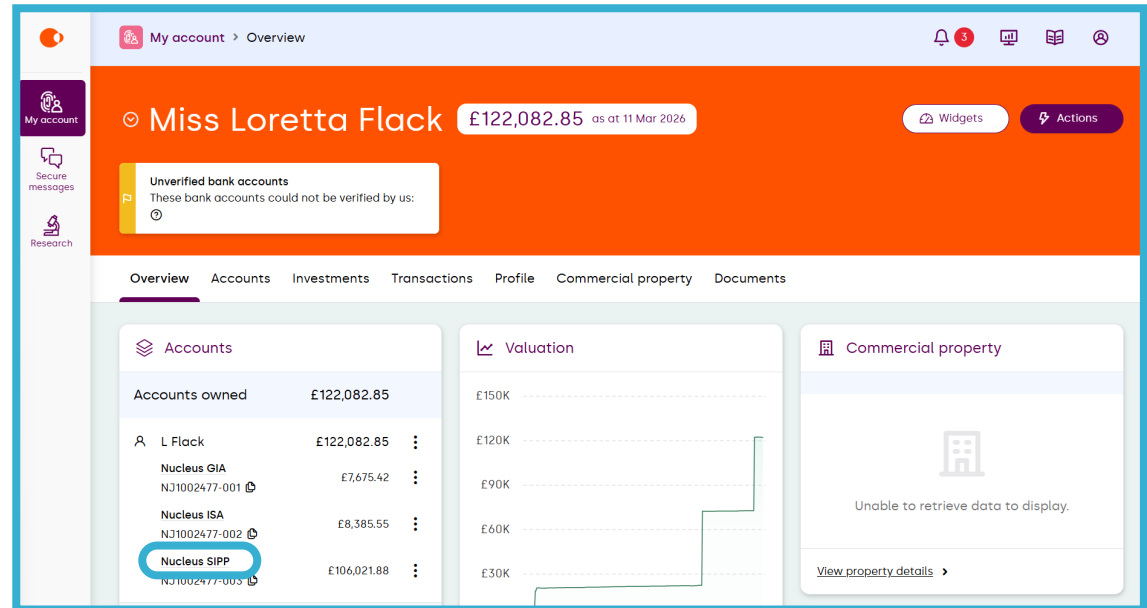
 We recommend using the zoom function to view the details on the platform screens in this guide.

How to view pension arrangements and income

To view your pension arrangements and income, select '**Nucleus SIPP**' or '**Nucleus Flexi-SIPP**' account from the accounts widget.

From the account details page select '**Valuation and income**'.

The percentage allocated and value of each arrangement is indicated here.



Further arrangement details are also shown.

Uncrystallised							
Arrangement ID	Arrangement	Date opened					
2481	Accumulation (2481)	13 Mar 2025					

Capped						
Arrangement ID	Arrangement	Inherited drawdown	Taxable	Date opened	Date closed	
3185	Crystallised fund (3185)	No	Yes	26 Feb 2026	-	

Flexi							
Arrangement ID	Arrangement	Inherited drawdown	Taxable	Convert from capped	Date converted	Date opened	Date closed
① No results found							

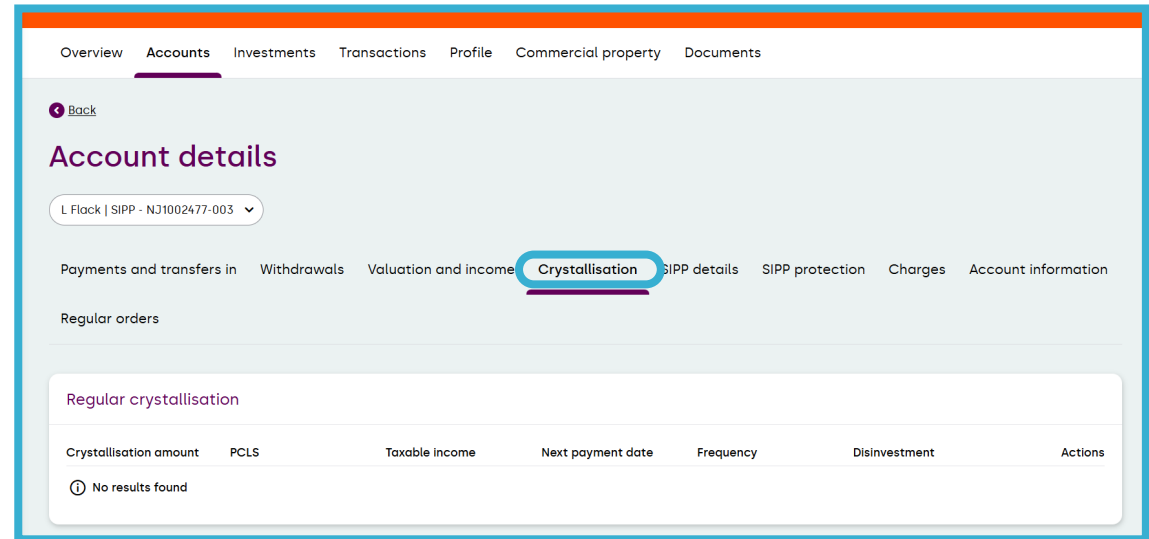
If you have an income arrangement, the income details are shown below on the screen.

Income					
Review					
Arrangement number	Arrangement	GAD maximum	Pension year start date	Reference period end date	Remaining GAD maximum
3185	Crystallised fund (3185)	£300,000.00	2025-04-06	2028-04-05	£300,000.00

How to view regular crystallisations

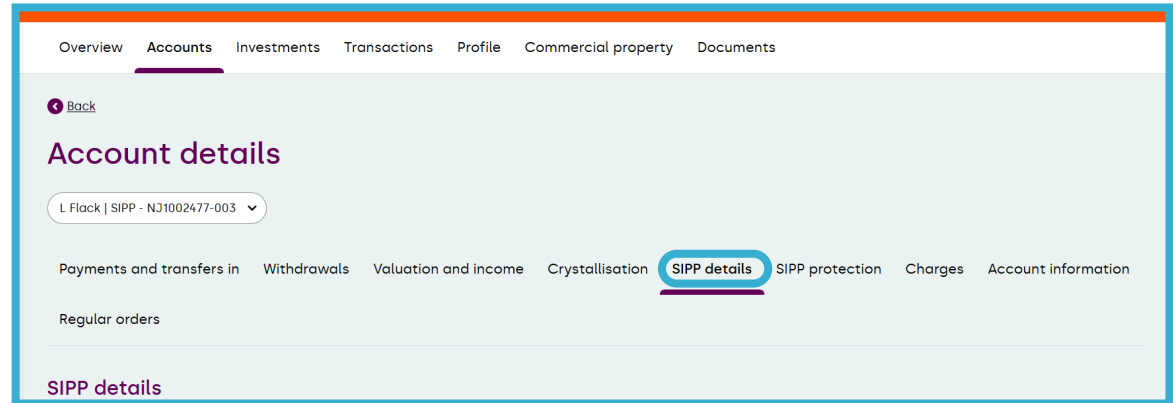
Within the SIPP account details screen, select the '**Crystallisation**' tab.

If applicable, your crystallisation details will be shown here.

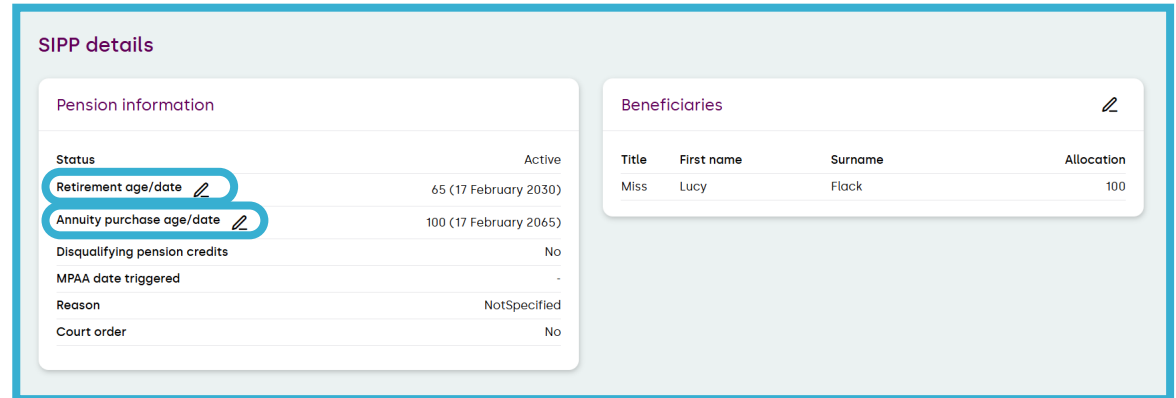


How to view SIPP details

Within the SIPP account details screen, select the 'SIPP details' tab.



On this page, you're able to make amendments where there's a pencil icon. Including 'Retirement age/date' and 'Annuity purchase age/date'.



How to add or amend beneficiaries

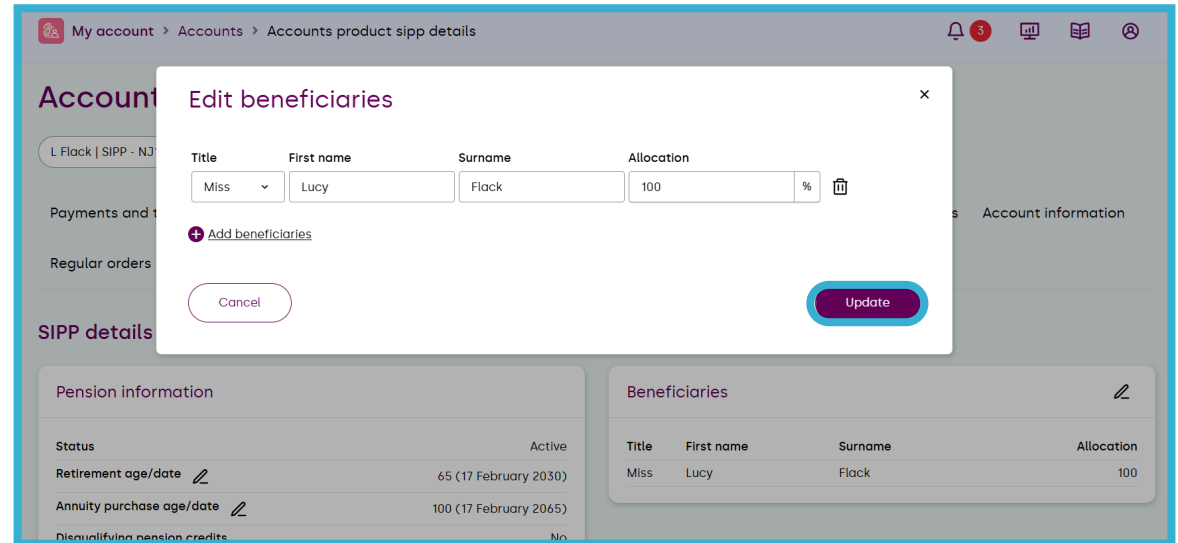
Within the SIPP account details screen. Select the pencil icon within '**Beneficiaries**'.

Here you can either amend any current details, or select '**Add beneficiaries**'. Once all details are complete, and the total allocation is 100%, select '**Update**' to submit.

To delete a beneficiary, select the bin icon.

Key message

There's no limit to the number of beneficiaries that can be added.



How to view pension protection


Within the SIPP account details screen, select the '**SIPP protection**' tab.

Any existing pension protection details will be displayed here.

This information can be updated by your adviser.

The screenshot displays the 'Account details' interface for a SIPP. At the top, the account identifier 'L Flack | SIPP - NJ1002477-003' is shown. Below this is a navigation menu with tabs for 'Payments and transfers in', 'Withdrawals', 'Valuation and income', 'Crystallisation', 'SIPP details', 'SIPP protection' (which is highlighted with a red circle), 'Charges', and 'Account information'. Underneath the navigation menu is a section for 'Regular orders'. The main content area is titled 'Pension protections' and contains a table of protection details.

Pension protections	
Enhanced Protection (No)	Primary Protection (No)
Fixed Protection 2012 (No)	Fixed Protection 2014 (No)
Fixed Protection 2016 (No)	
Individual Protection 2014 (No)	Individual Protection 2016 (No)
Relevant Overseas Individual (No)	Transfer From Overseas (No)
Receipt Of Pension Credit (No)	
Transitional Tax-Free Allowance Certificate (No)	Scheme specific protection as part of a block transfer (No)

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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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