

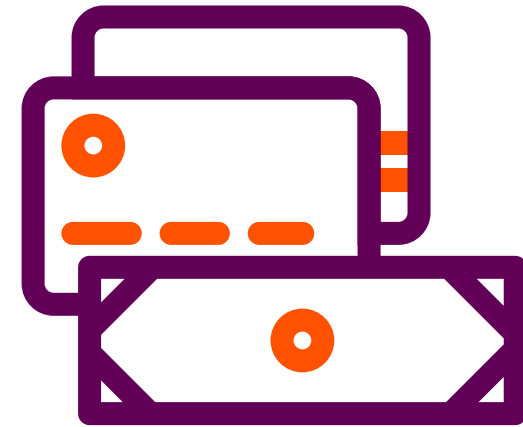
For advisers

Our new  
platform

# nucleus<sup>o</sup> platform

## How to edit or cancel a regular withdrawal

 2 minute read



## How to edit or 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 or cancel a regular withdrawal

To edit or cancel a regular withdrawal, you first need to find your client. If you need help finding your client, please refer to our client search guide on our website. Once you've located your client, you can refer to this guide to edit or cancel a regular payment.

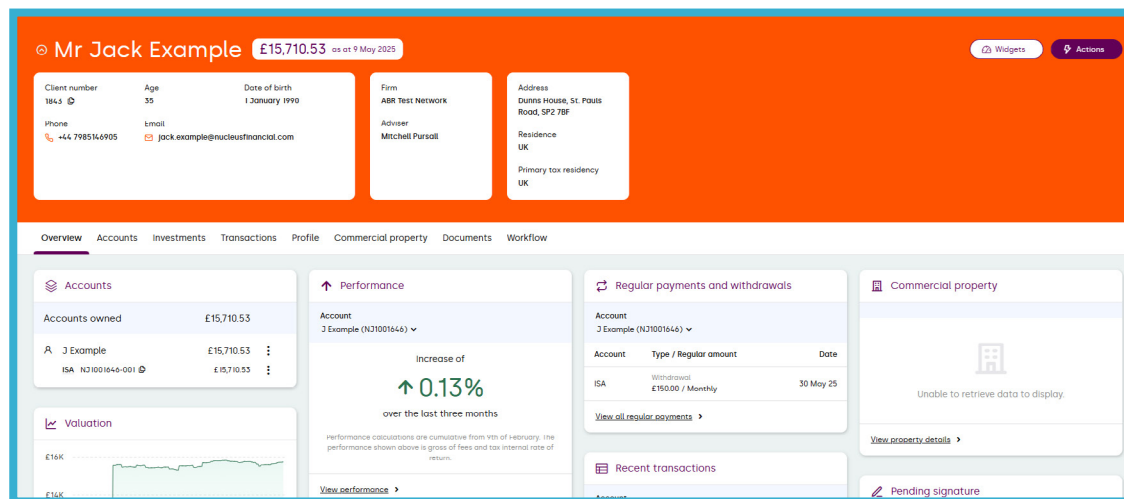


This guide is not for withdrawals from a pension. Please refer to the decumulation guides on our website.



This guide is for regular withdrawals created on the new Nucleus platform.

For regular withdrawals that are upgrading from James Hay, please refer to the "upgraded instruction" variant of this guide on our website.



From the client's home page, in the **'Accounts'** widget, select the product which you want to cancel or edit.

### Key message

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

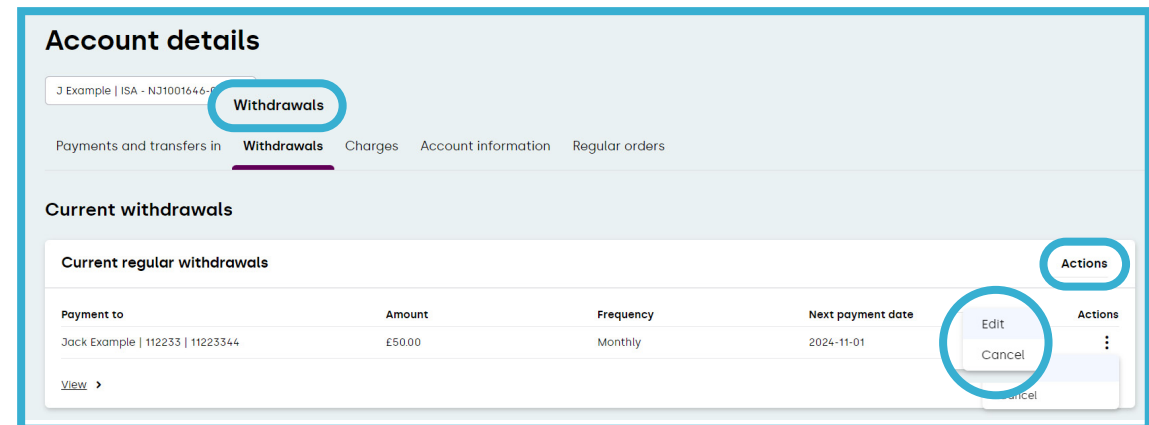
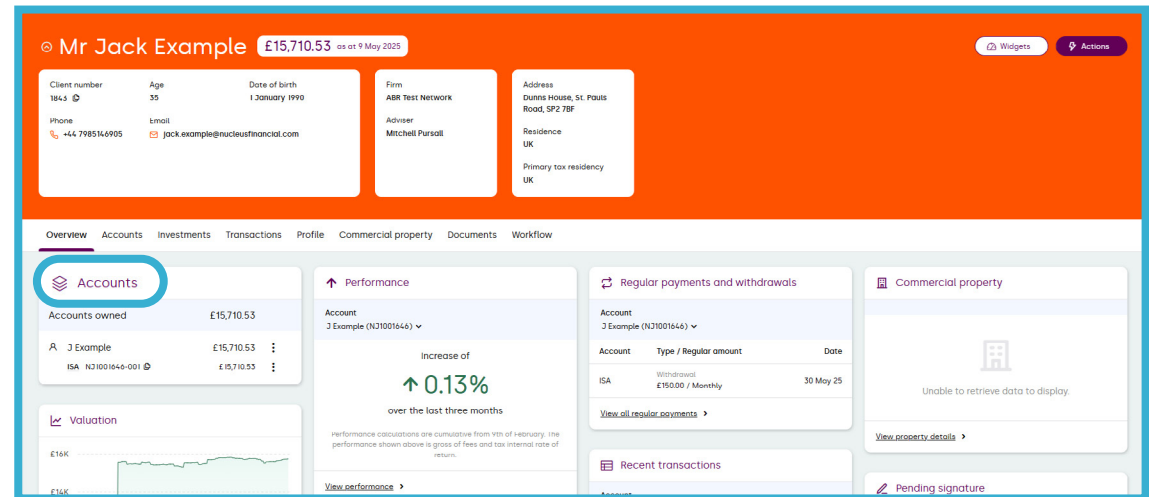
On the **Account details** screen, select the **'Withdrawals'** tab.

### Key message

All existing withdrawal instructions will appear on the screen.

To edit or cancel the regular withdrawal, select the vertical ellipsis (three dots) under the **'Actions'** column.

Choose to **'Edit'** or **'Cancel'** the regular withdrawal.



## Editing a regular withdrawal

Confirm if advice has been given to your client.

Make any necessary amendments to the withdrawal amount.



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

### Key message

You're unable to add new bank details from this page. To update bank details, please refer to our guide on our website.

Edit regular withdrawal

Jack Example  
Client ID: 1843  
Product reference: NJ1001646-001  
Product: ISA

### Withdrawal details

**Warning:** 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.

**Financial advice**

Did you give financial advice to your client in relation to this instruction?

Yes  No

**Edit the withdrawal amount**

Withdrawal amount

£ 150

Withdrawal frequency: Monthly

Next withdrawal date: 01/06/2025

Continue until: Until notified

Payment reference (optional)

School Fees

Bank account

11-22-33 | 11223344 | Highstreet Bank

**Edit regular withdrawal**

1. Withdrawal details
2. Review
3. Confirmation

Save and exit

Cancel

Continue

Choose which investments will fund the withdrawal. Even if there's sufficient cash to fund the withdrawal you can still choose to sell down assets.

Once complete, and you're happy with changes made, select '**Continue**'.

Payment reference (optional) ⓘ  
School Fees

Bank account ⓘ  
11-22-33 | 11223344 | Highstreet Bank

**Investments to sell**

Withdrawal amount monthly  
£150.00

Investment name	Available to sell	Estimated amount to withdraw ⓘ	Sell all ⓘ
Cash	£8,811.14	£ 0 ⓘ	<input type="checkbox"/>
<a href="#">ZIM AAP Adventurous C Acc</a>	£1,148.34	£ 50 ⓘ	<input checked="" type="checkbox"/>
<a href="#">Vanguard (Ireland) Emerging Markets Stock Index GBP Acc</a>	£1,015.82	£ 100 ⓘ	<input checked="" type="checkbox"/>
<b>Total</b>		<b>£150.00</b>	

Continue

## Review

Review the withdrawal details and ensure this is the correct instruction.



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

Edit regular withdrawal

**Review**

Jack Example  
Client ID: 1843  
Product reference: NJ1001646-001  
Product: ISA

**!** 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**

**i** 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

**i** 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.

**Review**

**Financial advice**

Did you give financial advice to your client in relation to this instruction?  Yes

**Edit regular withdrawal**

1. Withdrawal details ✓
2. Review
3. Confirmation

Save and exit

Cancel

Submit

Select the **'pencil'** icon to make any amendments.

### Key message

Ensure the illustration document is distributed to the client.

Read and confirm the declarations.

Then select **'Submit'**.

ISA

Updated withdrawal details

	From	To
Withdrawal amount	£100.00	£150.00
Withdrawal frequency	Monthly	Monthly
Next withdrawal date	1 Jul 2025	1 Jul 2025
Continue until	Until notified	Until notified
Reference	ISA Withdrawal	ISA Withdrawal
Bank account	11-22-33   11223344   Jack Example	11-22-33   11223344   Jack Example

Investments to sell

Investment	Old sell value	New sell value
7IM AAP Adventurous C Acc	£50.00	£100.00
Vanguard (Ireland) Emerging Markets Stock Index GBP Acc	£50.00	£50.00
Cash	£0.00	£0.00
<b>Estimated net order value</b> ⓘ	<b>£100.00</b>	<b>£150.00</b>

Supporting documents to be sent to the client

ISA Illustration (398929)

Declarations

Disclosure

I have appropriate consent from my client(s) to give this instruction on their behalf.

Confirm all

Edit regular withdrawal

1. Withdrawal details ✓
2. Review
3. Confirmation

Save and exit

Cancel

Submit

Your instruction has been completed.



To view your transaction, select  
**'Client dashboard'**.

Edit regular withdrawal

**Confirmation**

Jack Example  
Client ID: 1843  
Product reference: N31001646-001  
Product: ISA

**ⓘ** 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.

Instruction complete


Edit regular withdrawal instruction submitted for  
**Mr Jack Example**  
ISA: N31001646-001

**Client dashboard**

Select the **'Workflow'** tab. Your transaction will be listed at the top in the details section.

Then select the vertical ellipses (three dots) under the **'Actions'** column to view your edited transaction.

The screenshot displays a financial dashboard for 'Mr Jack Example' with a balance of £15,710.53 as of 9 May 2025. The dashboard includes a navigation menu with tabs for Overview, Accounts, Investments, Transactions, Profile, Commercial property, Documents, and Workflow (which is highlighted). Below the navigation, there is a section for 'Accounts owned' showing £15,710.53. The 'All activities' section is set to the period 'Past 3 months' from 9 Feb 2025 to 9 May 2025. A 'Details' section contains an information message: 'The product and product reference won't always be populated if the data isn't available. Generally, these fields will be blank for activities such as 'New Business' and 'Add Product' where the references aren't yet available.' Below this is a table of activities:

Date started	Activity type	Account name	Product	Product reference	Adviser	Status	Created by	Last updated	Actions
09 May 2025	Edit regular withdrawal	J Example	ISA	NJ1001646-001	Mitchell Pursall	Completed	Loretta Flack	09 May 2025	<a href="#">View</a> 
09 May 2025	Add regular withdrawal	J Example	ISA	NJ1001646-001	Mitchell Pursall	Completed	Loretta Flack	09 May 2025	<a href="#">View</a>

At the bottom, there is a pagination control showing page 1 of 1 and a 'Results per page' dropdown set to 10.

## Cancel a regular withdrawal

From the client's home page, in the **'Accounts'** widget, select the product which you want to cancel.

### Key message

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

On the **account details** screen, select the **'Withdrawals'** tab.

### Key message

All existing withdrawal instructions will appear on the screen.

To cancel the regular withdrawal, select the vertical ellipsis (three dots) under the **'Actions'** column of the chosen product, and select **'Cancel'**.

**Mr Jack Example** £15,534.93 as at 30 September 2024

Client number: 1843 | Age: 34 | Date of birth: 01-January-1990 | Firm: ABR Test Network | Address: Dunns House, St. Pauls Road, SP2 7BF

Phone: +44 7985146905 | Email: jack.example@nucleusfinancial.com | Adviser: Mitchell Pursall | Residence: UK | Primary tax residency: UK

Overview | Investments | Transactions | Profile | Commercial property | Documents | Workflow

**Accounts** | Valuation | Latest documents | Recent transactions

Accounts owned: £15,534.93

Account	Balance
J Example	£15,534.93
ISA NJ1001646-001	£15,534.93

Back

### Account details

J Example | ISA - NJ1001646-001

Payments and transfers | **Withdrawals** | Charges | Account information | Regular orders

Current withdrawals

Current regular withdrawals


Payment to	Amount	Frequency	Next payment date	Actions
Jack Example   112233   11223344	£150.00	Monthly	2025-05-30	Edit   <b>Cancel</b>

## Review


### Key message

Ensure you're cancelling the correct regular withdrawal.

Confirm you've read and accepted the declarations and then select **'Yes'** to cancel the regular withdrawal or **'No'** if you don't wish to continue with the cancellation.

 If you select **'No, do not cancel'**, you'll return to the client home page.

If you select **'Yes, I'd like to cancel'**, you'll move to the confirmation screen showing that the regular payment is now cancelled.

 If you have a current regular withdrawal, the cancellation will apply to future regular withdrawal payments.

To return to the client home page select **'Client dashboard'**.

Cancel regular withdrawals Jack Example  
Client ID: 1843  
Product reference: NJ1001646-001  
Product: ISA

### Review

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

Amount	£150.00
Withdrawal frequency	Monthly
Bank account	11223344 11-22-33
Next withdrawal	30 May 2025 00:00:00

Declarations

Disclosure

I have appropriate consent from my client(s) to give this instruction on their behalf.

Confirm all


[Yes, I'd like to cancel](#) [No, do not cancel](#)

Cancel regular withdrawals Jack Example  
Client ID: 1843  
Product reference: NJ1001646-001  
Product: ISA


### Confirmation


Instruction complete


Cancel regular withdrawal instruction submitted for

 **Mr Jack Example**  
ISA: NJ1001646-001

[Client dashboard](#)

 03455 212 414

 [ask@nucleusfinancial.com](mailto:ask@nucleusfinancial.com)

 [nucleusfinancial.com](https://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 Tynetalk service on 18001 03455 212 414.**

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