

Request for an estimated discount illustration

(Nucleus Onshore and Offshore Bond accounts only)

Nucleus client relations, PO BOX 26968, Glasgow G2 9DY.

Please use this form to used to request an estimated discount illustration in relation to the Discounted Gift Trust (DGT). Please refer to our adviser guides for more information on this process.

Please fully complete this form before sending it to us at the above address or via Jira messaging. If you've any questions, please contact your Nucleus client relations team who'll be delighted to help.

Nucleus and the providers of the Nucleus Onshore Bond (Countrywide Assured plc) and the Nucleus Offshore Bond (RL360 Insurance Company Limited), each data controllers under the applicable data protection legislation, will process the personal data provided in this form in order to estimate the discounted value of the gift into trust and to administer the relevant policy accordingly.

By completing this form you confirm:

- you have obtained the consent of the applicant(s) to provide the personal data; and
- you have explained to the applicant(s) the purposes for which their personal data will be used.

Applicant details

First applicant

Second applicant

Name

Name

Title Miss Mr Mrs Other (please state)

Title Miss Mr Mrs Other (please state)

Date of birth

Date of birth

Investment amount

Investment amount

£

£

Details of any proposed withdrawals e.g. 4% annually

Details of any proposed withdrawals e.g. 4% annually

%

%

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0131 226 9535, or via the Relay UK service on 18001 0131 226 9535.



0131 226 9535



client.relations@nucleusfinancial.com



www.nucleusfinancial.com