For advisers

Our new platform

nucleus platform

How to process a JISA regular payment top up application



3 minute read

How to process a JISA regular payment top up application

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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.

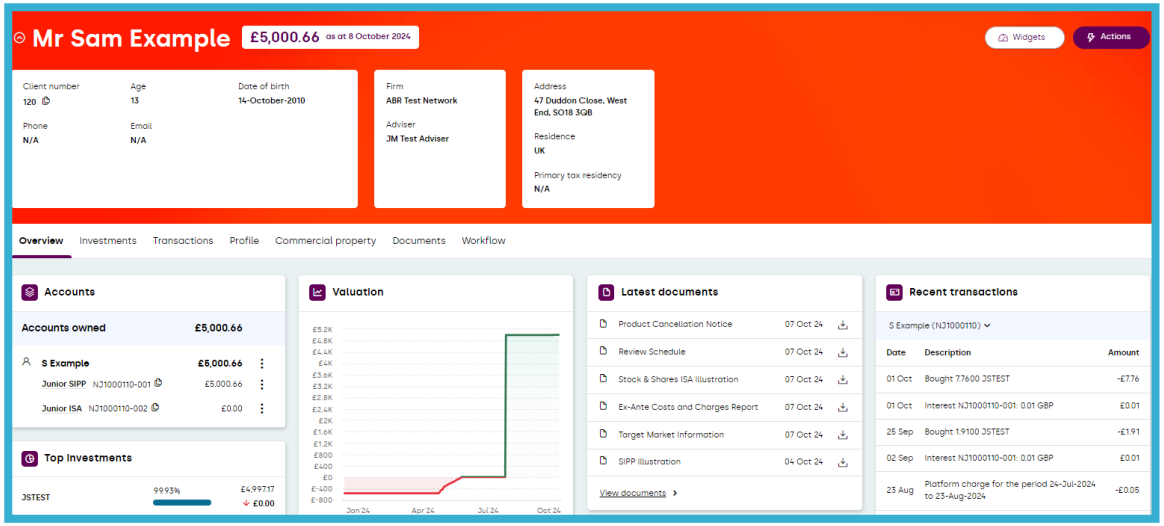
How to process a JISA regular payment top up application

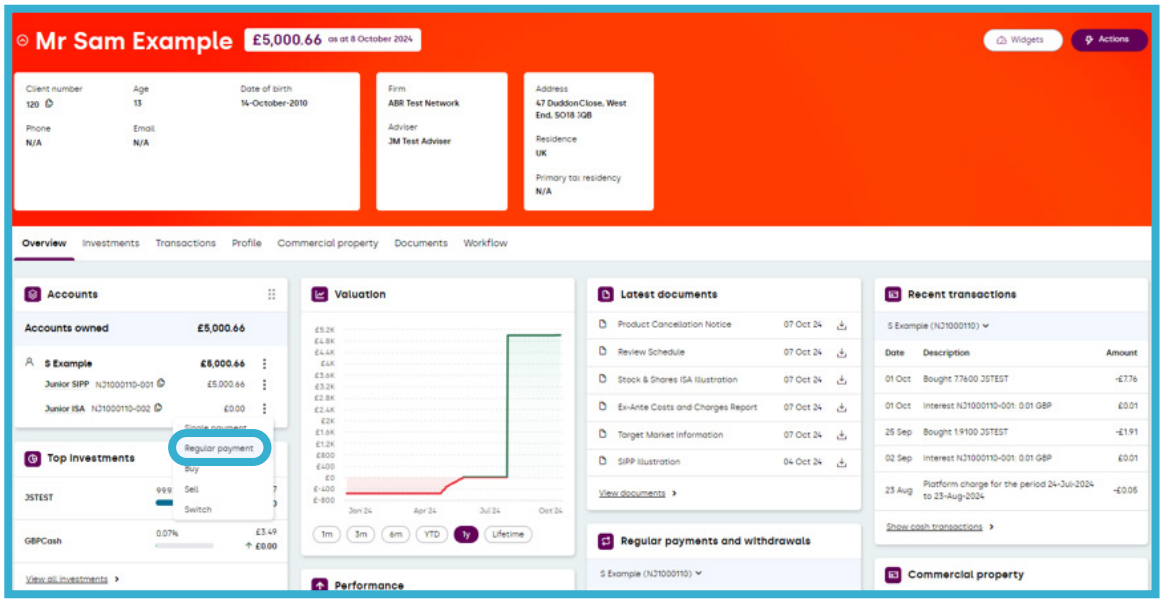
To start the JISA regular top up application, you first need to find your client. Please refer to the guides on our website to search for a client or create a new client.

Once you've located your client, you can refer to this guide to proceed with submitting the ISA regular top up.

From the client home page, locate the relevant account and select the vertical ellipses (three dots).

A list of actions will appear. To create the top up application, select '**Regular payment**'.





Key message

At any stage of the top up application, you can save and exit the application. To resume the application, go to the workflow tab within the client's account.

Payment in

Confirm if advice has been provided to the client.

You can select multiple regular payment in types when completing the application.

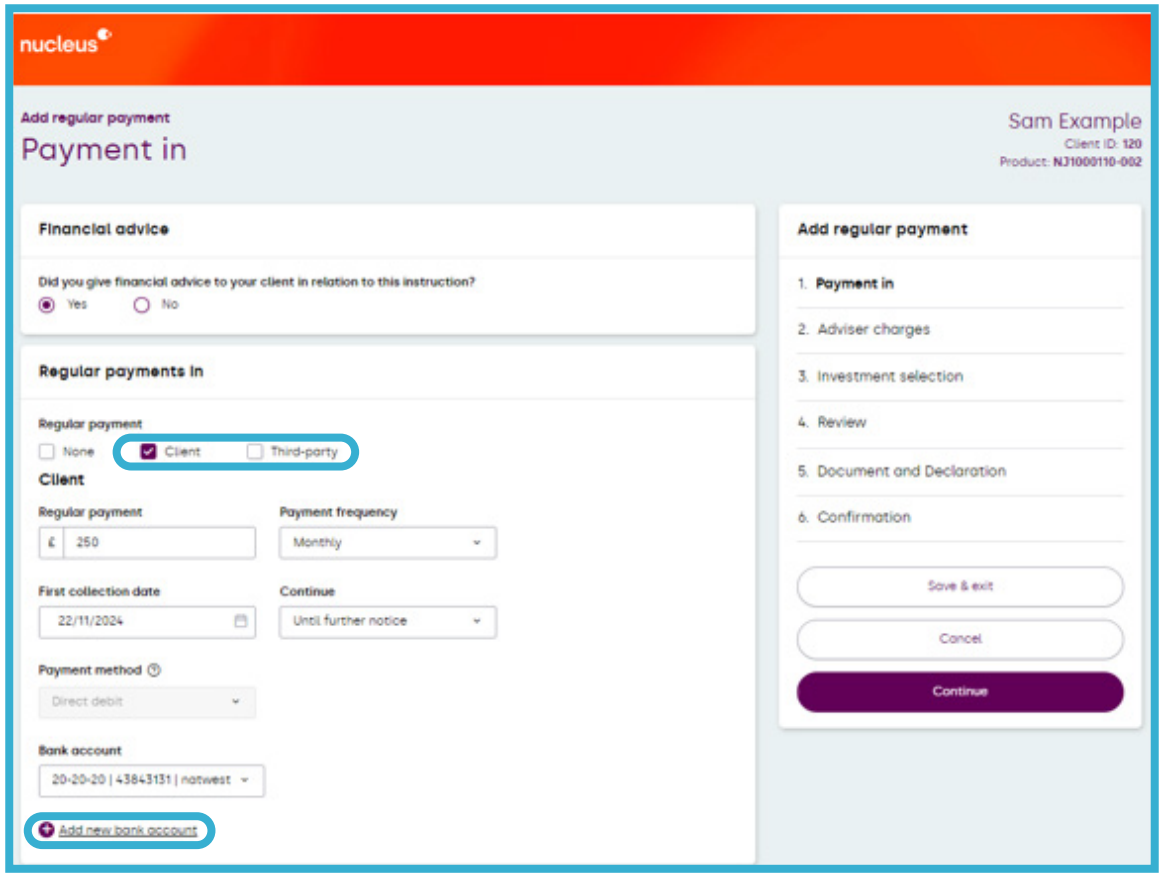
Select either '**Client**' or '**Third-party**' and enter the regular payment amount, payment frequency, first collection date and the duration.

The payment method will be pre-selected to Direct Debit.

Select the bank account from the drop-down list.

The collection date can be any date from 1 - 28 of the month.

Please note, there's a minimum of 10 working days required to set up the Direct Debit instruction.



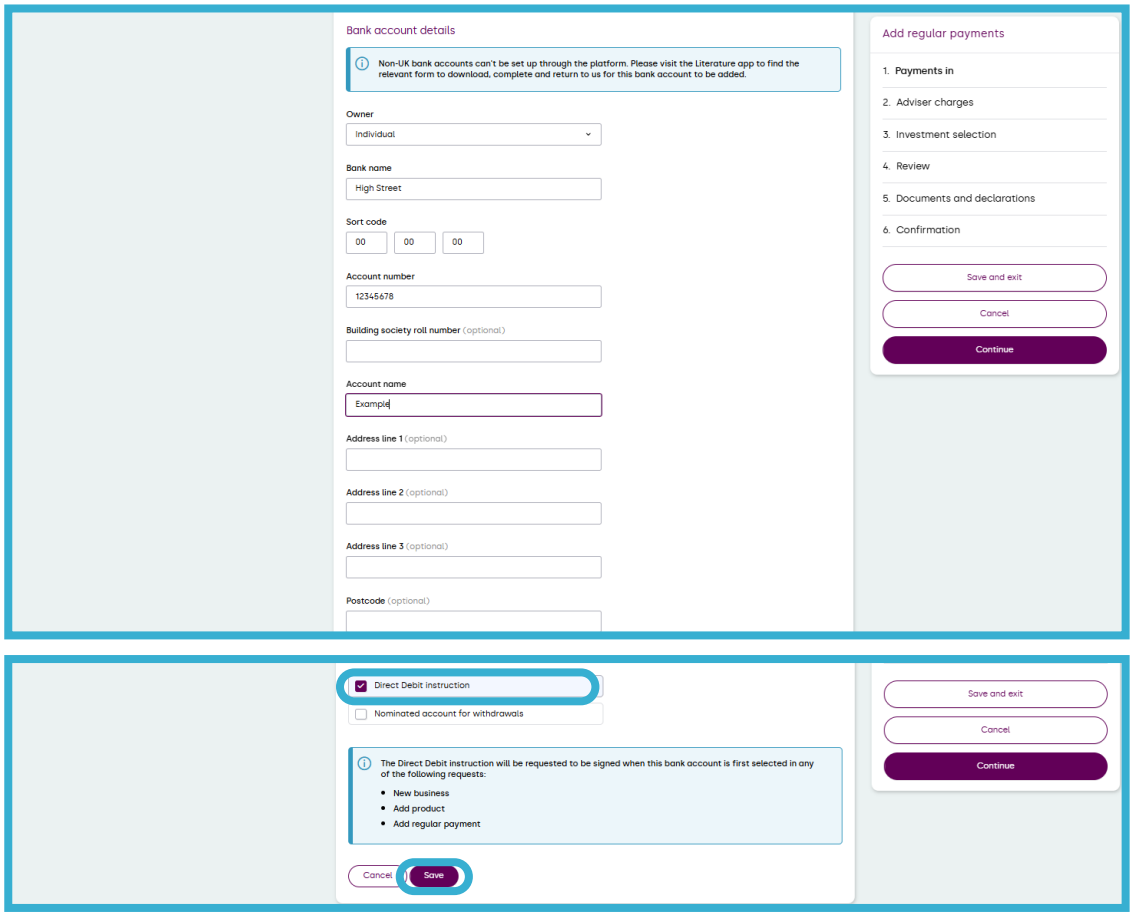
If you need to add a new bank account, please select '**Add new bank account**'.

Complete your client's bank details.

Select '**Direct Debit instruction**', and then '**Save**', to submit the bank details.

The collection date can be any date from 1 - 28 of the month.

Please note, there's a minimum of 10 working days required to set up the Direct Debit instruction.

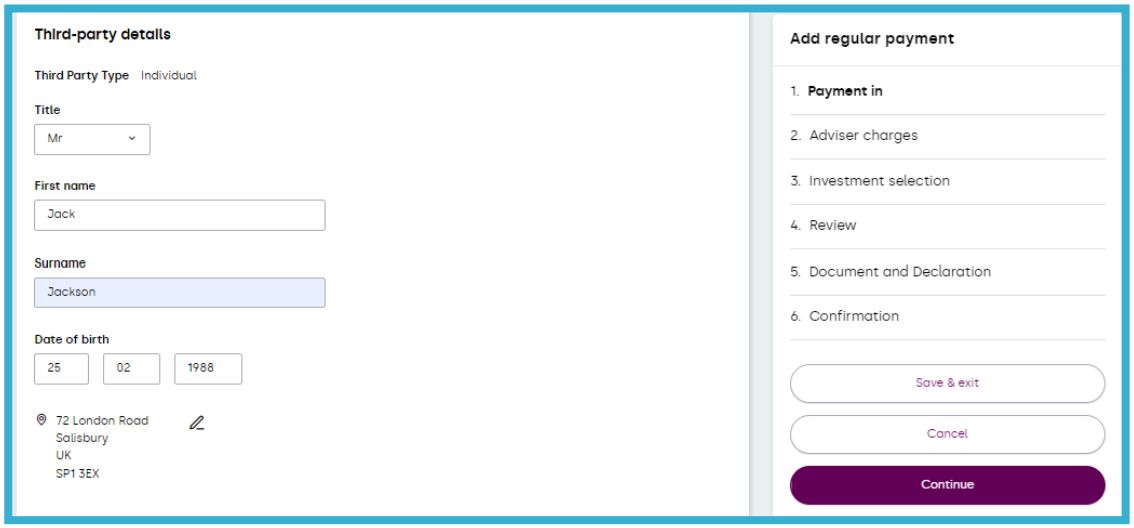


For a Third-party payment, enter the third-party's personal details.

Key message

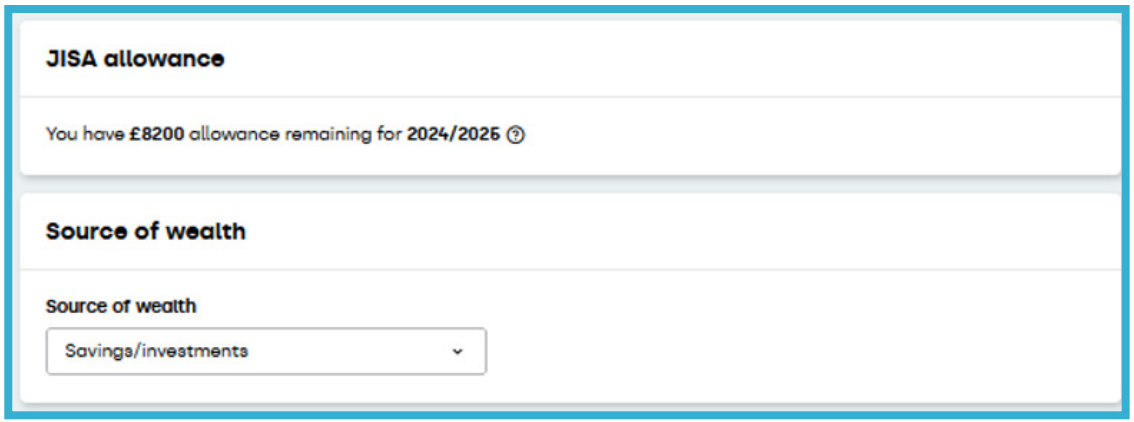
This section informs you of your client's remaining JISA allowance for the current tax year.

The remaining allowance is calculated using the details entered on this page.



Select source of wealth from drop down list.

Once you're happy with your payment preferences, select '**Continue**' to move on to the adviser charges page.



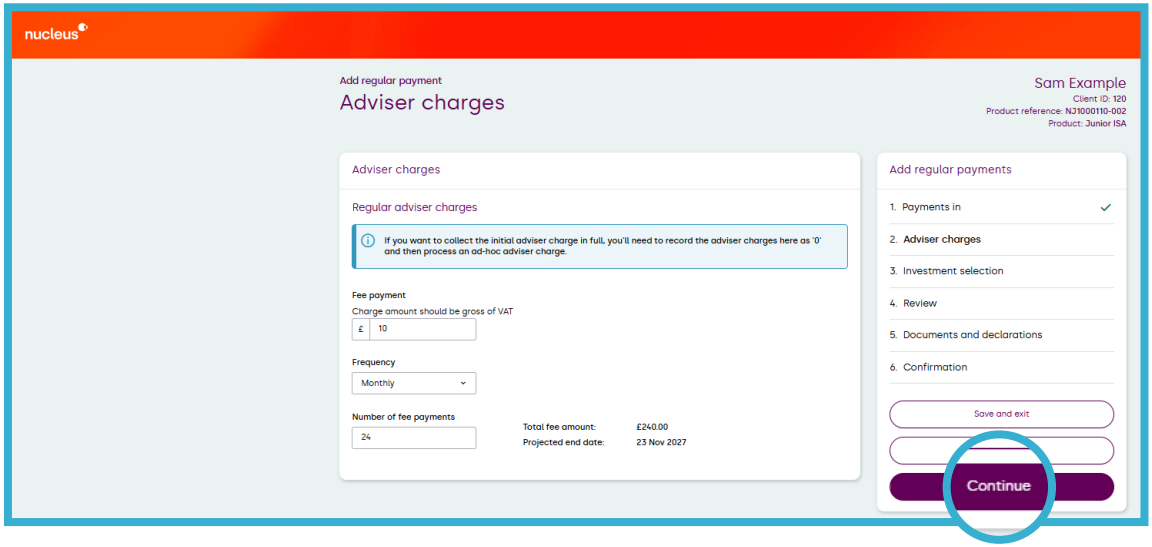
Adviser charges

If you're applying for a regular adviser charge, please enter the amount.

Select the required frequency and number of payments.

If there are no adviser charges to be deducted, enter zero into the fields.

For more information about adviser charges, visit our website.



Once you're happy with your adviser charge preferences, select '**Continue**' to move on to the investment selection page.

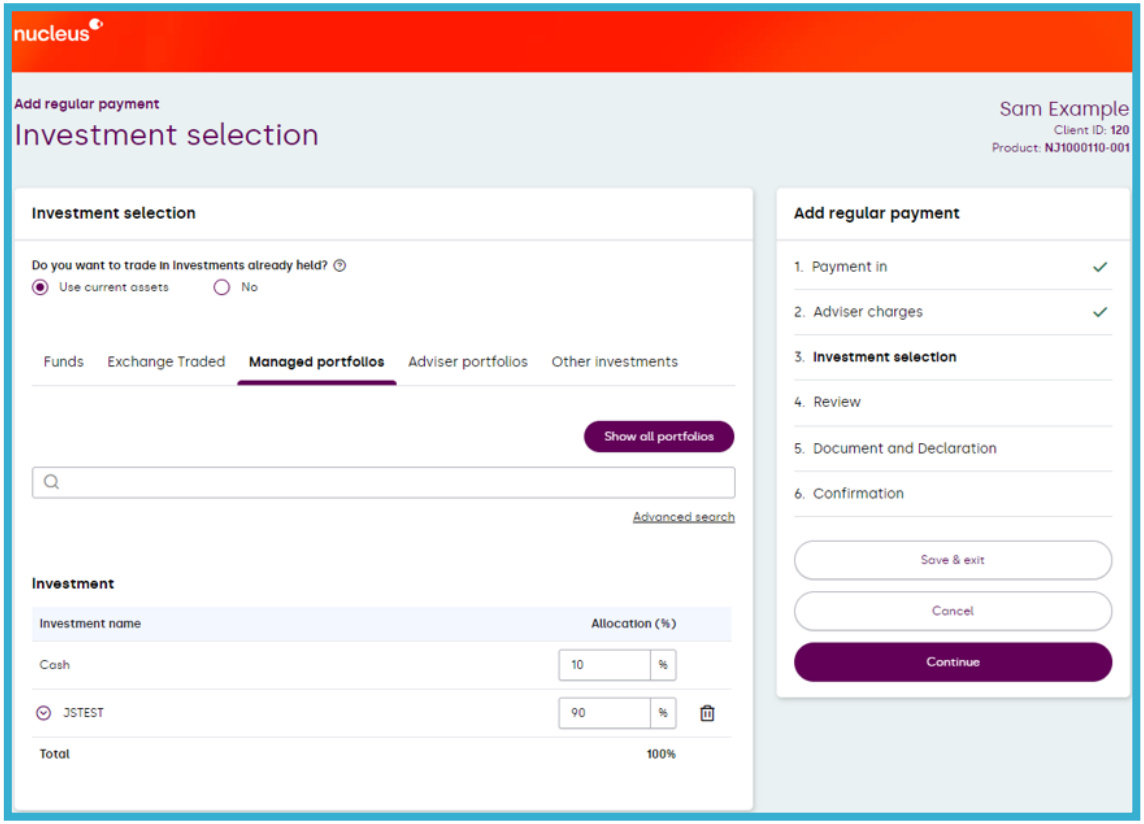
Investment selection

Confirm if the top up application will be invested into current or new assets.

Current assets

The current investment selection will appear at the bottom of the page.

Enter the percentage to be allocated to each investment. Ensure the totals entered equal 100%.



New assets

If you're investing into assets not currently held, select '**No**'.

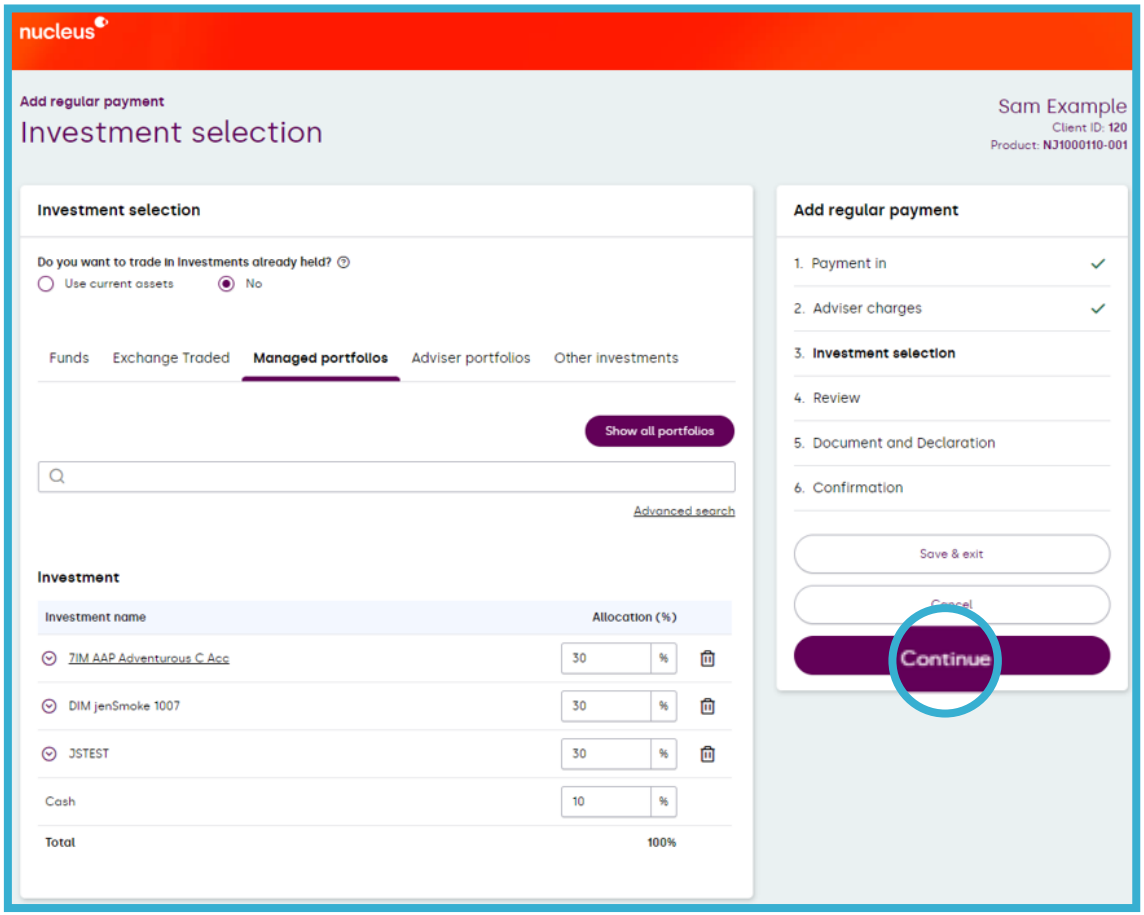
Select the investment type across the headings shown here.

Your client can now hold loose assets, multiple model portfolios, ETIs, and other investments, all within the same account. Investments will be purchased when funds are available for investment.

Enter the investment name into the search bar, then select the investment from the results.

Enter the percentage to be allocated to each investment. Ensure the totals entered equal 100%.

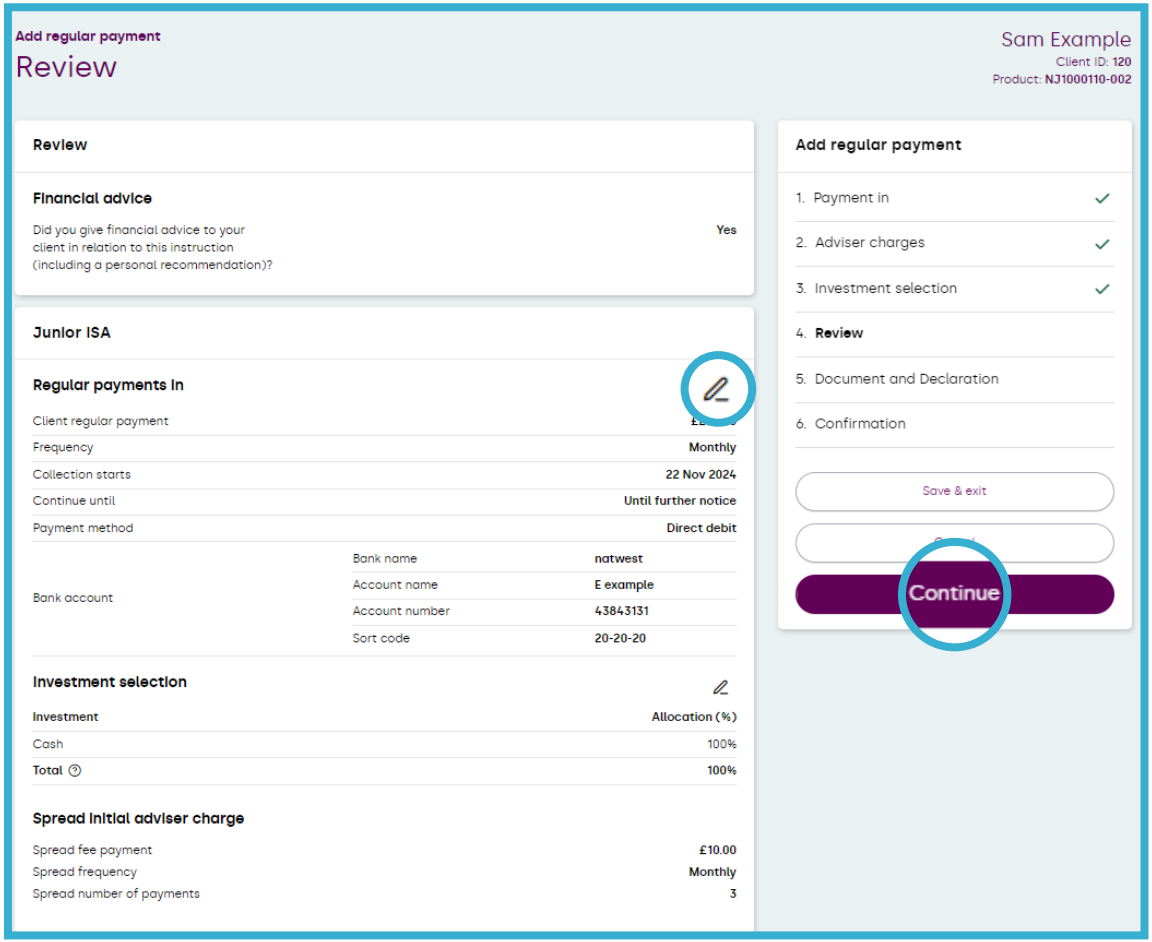
Once you're happy with your investment preferences, select '**Continue**' to move on to the review page.



Review

Review the application details for accuracy. Use the '**pencil**' icon to make any necessary changes.

Once you're happy with the accuracy of the application, select '**Continue**' to move on to the declaration and documents page.



Declarations and documents

Wet signature is the only option that will be available for junior products.

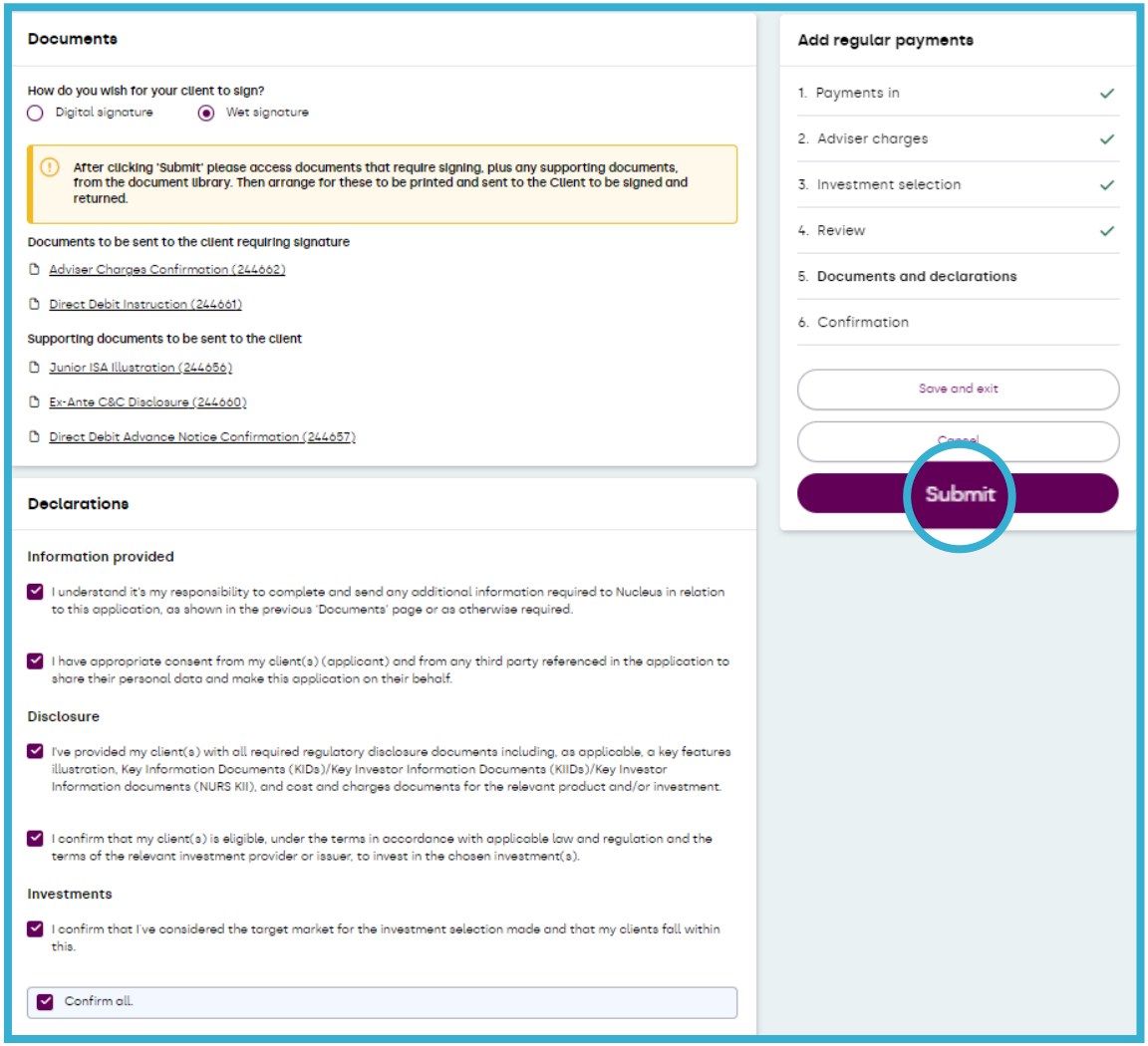
All relevant documents and illustrations will be produced here.

Documents will be available to download within the documents library.

Documents can't be amended once submitted. If there are any amendments to be made to documentation, you'll need to resubmit the application to generate new documents.

Read through the declarations and tick to confirm completion.

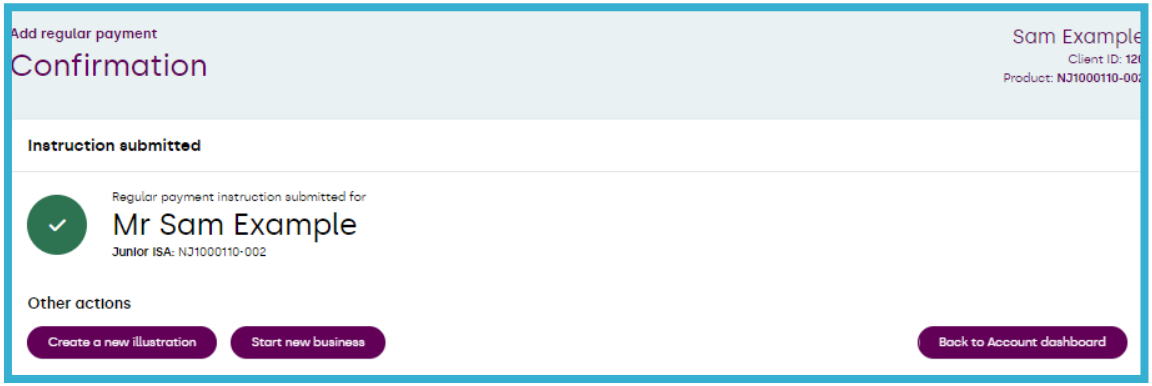
Select '**Submit**' to submit the top up business application.



Confirmation

The top up application has been successfully submitted.

From here, you can create a new illustration, start a new business application or return to the account dashboard.



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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06/2026