

For advisers

Our new
platform

nucleus^o
platform

How to cancel
a third party
and employer
regular payment

🕒 1 minute read



How to cancel a third party and employer regular payment

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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 cancel a third party and employer regular payment



To cancel a regular payment (third party and employer), you first need to search for your client.

To search for your client, follow the **Client search** quick guide.

Once you've located your client, you can refer to this guide to cancel the third party or employer regular payment.



Your client must have an existing active third party or employer regular payment to proceed.



Any payments scheduled within next 8 business days will still be collected.

From the client landing page select the account by selecting the product name e.g. in this example '**Nucleus SIPP**'.

Client number: 2442, Age: 55, Date of birth: 01-January-1970, Firm: ABR Test Network, Address: Marlow House, 1A Lloyer's Avenue, EC3N 3SA, UK. Primary tax residency: UK. Email: drellenexample@nucleus.com, Adviser: James Place.

Accounts owned	Value
E Example	£163,800.13
Nucleus SIPP N31002356-001	£163,800.13
E Example ISA N31002344-001	£71,696.82

Date	Description	Amount
03 Feb	Interest payment	£450.13
10 Dec	Initial Adviser Charge for Single Payment/Cash Transfer - Nucleus SIPP	-£1,650.00
10 Dec	Deposit via direct credit	£165,000.00

Performance: Decrease of **↓0.36%** Since 10th of December

All current regular payments will appear on the screen, under the "Payments and Transfers In" sub header.

Select the vertical ellipses under actions on the regular payment you wish to cancel, then select **'Cancel'**.

The screenshot shows the 'Account details' page for an account named 'E Example | SIPP - NJ1002356-001'. The 'Payments and transfers in' tab is selected. Under the 'Active' section, there is a table for 'Current regular payments' with two rows: 'ThirdParty' and 'Employer (Gross)'. The 'Actions' column for the 'Employer (Gross)' row is highlighted with a blue circle, and a 'Cancel' button is also highlighted with a blue circle. Below the table are sections for 'Expected single payments' and 'Pending transfers in'.

Payer type	Payment from	Amount	Frequency	Next payment date	Investment allocation	Actions
ThirdParty	*****	£500.00	Monthly	20 Mar 2025	View	⋮
Employer (Gross)	*****	£1,000.00	Monthly	20 Mar 2025	View	Cancel

Payer	Payment method	Amount
Third party	Direct Debit	£500.00
Employer (gross)	Direct Debit	£1,000.00

Date requested	Transfer from	Ref.	Amount	Last updated	Status
ⓘ No results found					

Review

Review the details to ensure you're cancelling the correct regular payment.

Please read through the declaration and tick to confirm completion.

Select **'Yes, I'd like to cancel'** to submit the cancellation.

Select **'No, do not cancel'** to return to your client account.

Cancel regular payment

Review

Ellen Example
Client ID: 2442
Product reference: NJ1002356-001
Product: Nucleus SIPP

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

Regular payment details

Amount	£500.00
Payment frequency	Monthly
Bank account	20-20-20 09876580
Next payment	20 Mar 2025 00:00:00

Declarations

Disclosure

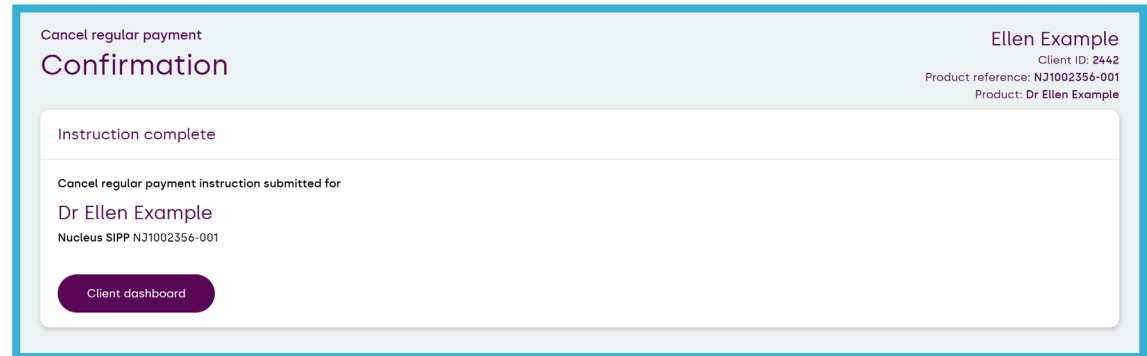
I have appropriate consent from my client(s) to give this instruction on their behalf.


Confirm all


Any payment scheduled in the next eight business days will be still collected. All future payments will be cancelled.


Confirmation

The regular payment cancellation has been submitted.



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 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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