For advisers

Our new platform

nucleus platform



How to cancel a third party and employer regular payment

1 minute read

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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.

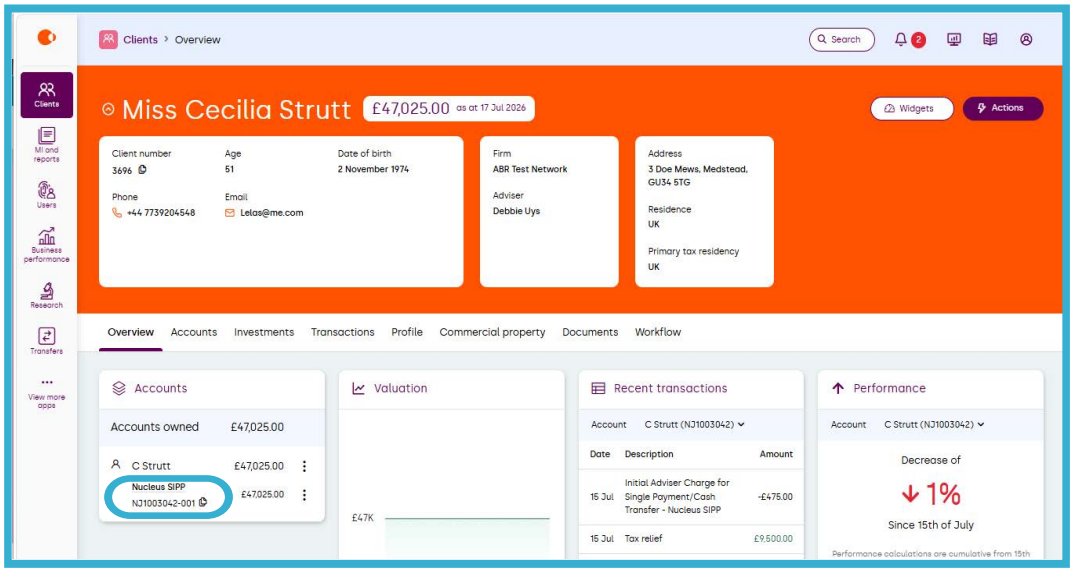
To search for your client, follow the **Client search** quick guide.

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

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

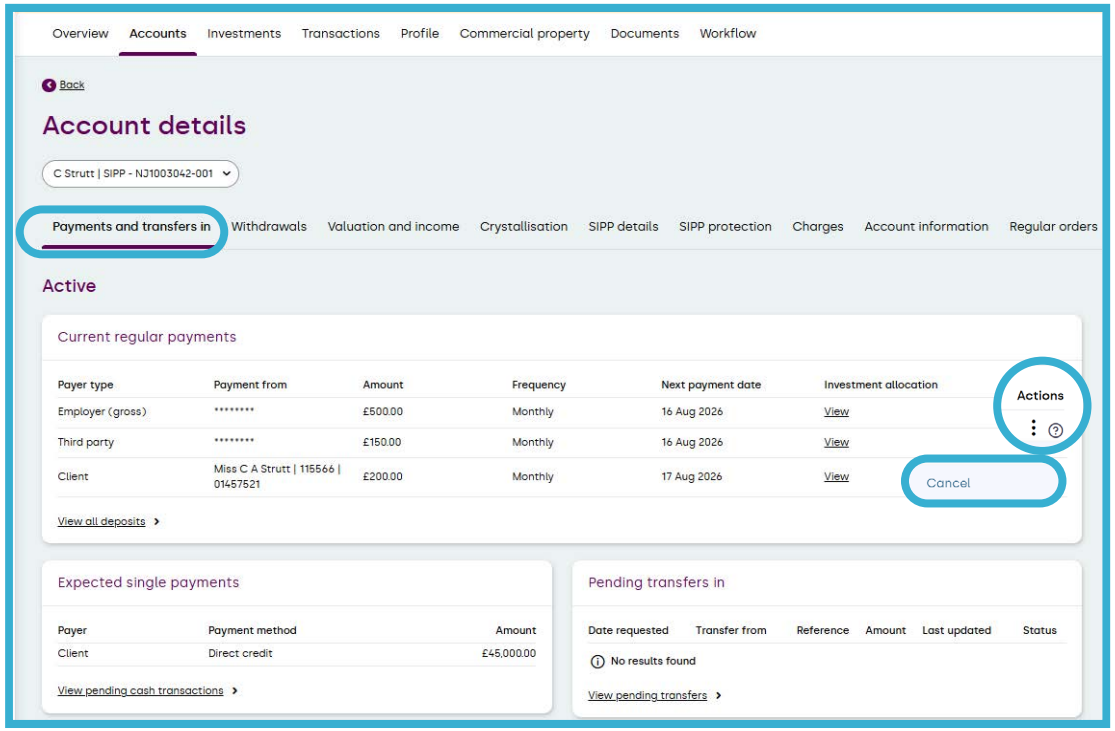
Any payments scheduled within next 8 business days will still be collected.

From the client's home page, select the account by clicking on the product name**, 'Nucleus SIPP'**.



All current regular payments will appear on the screen, under the “Payments and Transfers In” sub heading.

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



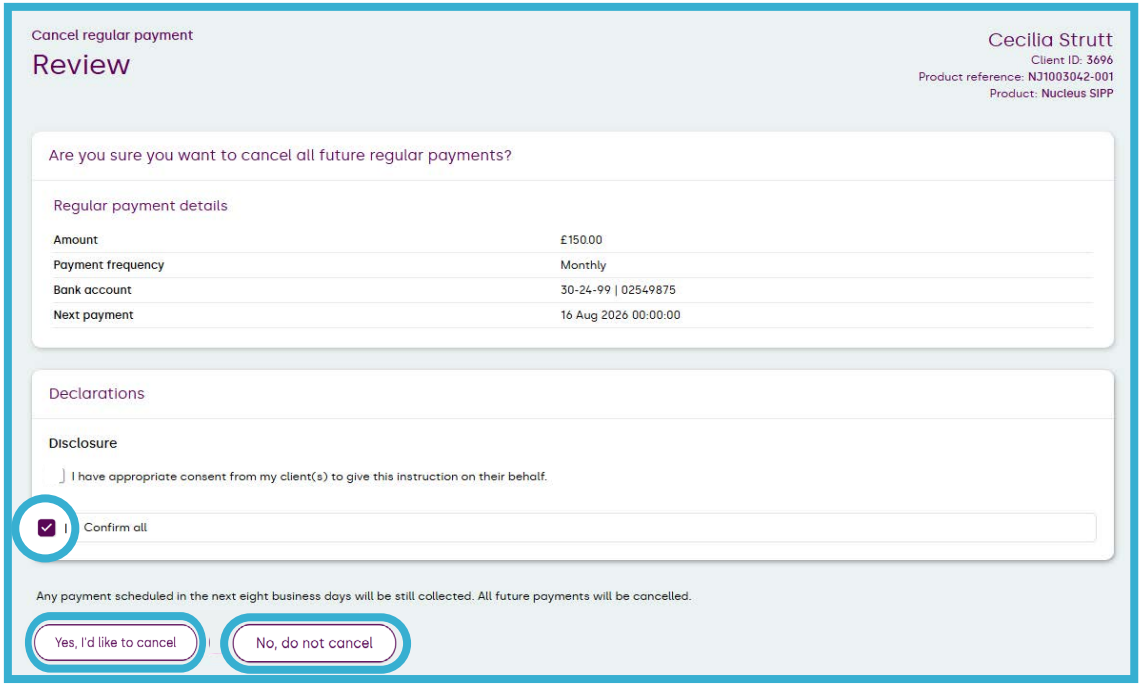
Review

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

Read the declaration and tick to confirm consent.

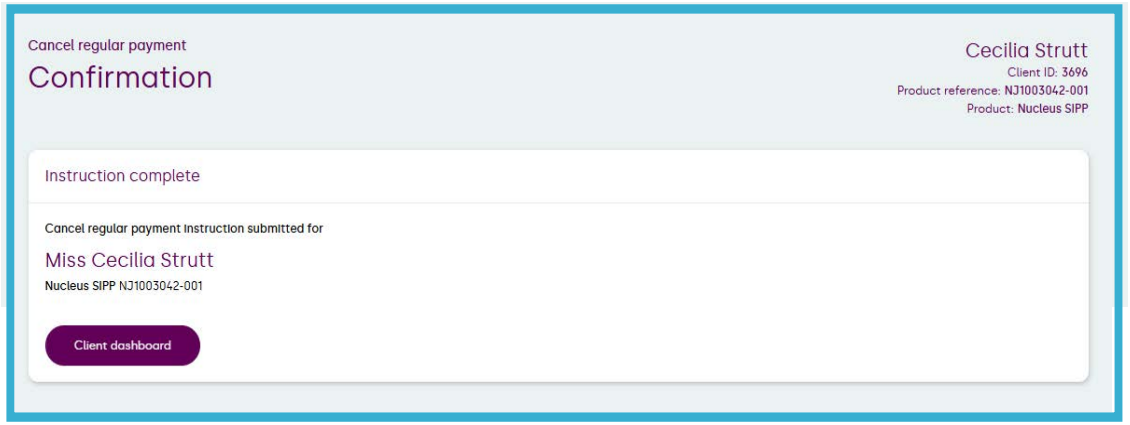
Select **'Yes, I'd like to cancel'** to submit the cancellation.

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



Confirmation

The regular payment cancellation has been submitted.



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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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