



Withdrawal form

Please complete and sign before forwarding to us at the address below, or via Jira Messaging:.

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

 For use with Isa, General and General gross accounts only. Please complete and sign before sending to us at the above address or via Jira messaging. If anyone forgets to add a date to their signature, we'll treat the date we receive this form as the signing date.

 If you've any questions please don't hesitate to contact our client relations team at 0131 226 9535 or client.relations@nucleusfinancial.com

Client details

Name Nucleus account number(s)
N

Income/withdrawal details – please select your preference

100% full withdrawal and account closure

Natural income – please tick

And/or

Fixed amount

£

Payment frequency

Single Monthly Quarterly Six monthly Annually

Preferred start date (for regular withdrawals)

Please allow 10 business days for us to set up any regular withdrawal.

Payment instructions

Where you've more than one bank account aligned to your Nucleus wrap please confirm the last four digits of the bank account you wish payments to be made to.

Note: to align a new bank account to the Nucleus wrap a separate signed instruction providing the bank account details is required. Please refer to our [change of bank details form \(0136\)](#) from the general section of the platform library.

If no bank account is selected, payment will be made to the most recently added bank account.

Authorisation

- 1 I/We declare to the best of my/our knowledge that the statements made in this application are correct and complete.
- 2 I/We understand that in some circumstances, income payments that I/we receive as a result of completing this application will cause me/us to incur a tax liability.
- 3 I/We understand that any withdrawals will be taken from the cash element of my/our Nucleus account shown opposite. I/We understand that I/we should make sure that there's sufficient cash within my/our Nucleus account to meet these withdrawals.

Client/First trustee signature

Signed

Date

Joint holder/Second trustee signature

Signed

Date

Third trustee signature

Signed

Date

Fourth trustee signature

Signed

Date

Or

Signed by the adviser on behalf of the client (not for use with corporate or trustee accounts).

I can confirm that I've received an instruction from the client requesting this course of action.

Signed

Date

Note: all individual trustees must sign so if there are more than four please photo copy the this page and delete the trustee numbers and replace as necessary.

Trust account

HMRC rules, introduced from 1 September 2022, require us to obtain proof that the trust is registered with the Trustee Registration Service (TRS). If you have not previously supplied the proof of registration document, please send it to us so we can verify that the beneficial ownership information on the trust record matches our own records.

Please note if Proof or Registration is not received this can delay processing of your request.

If you're unsure whether a trust should be registered on the TRS, please visit the dedicated GOV.UK page, as we're unable to provide advice on this matter, or register a trust on your behalf.