

For advisers

Our new
platform

nucleus^o
platform

How to add or
remove a client
bank account

 2 minute read



How to add or remove a client bank account

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How to use this document



Important information will look like this.

Key messages

Key messages will look like this.

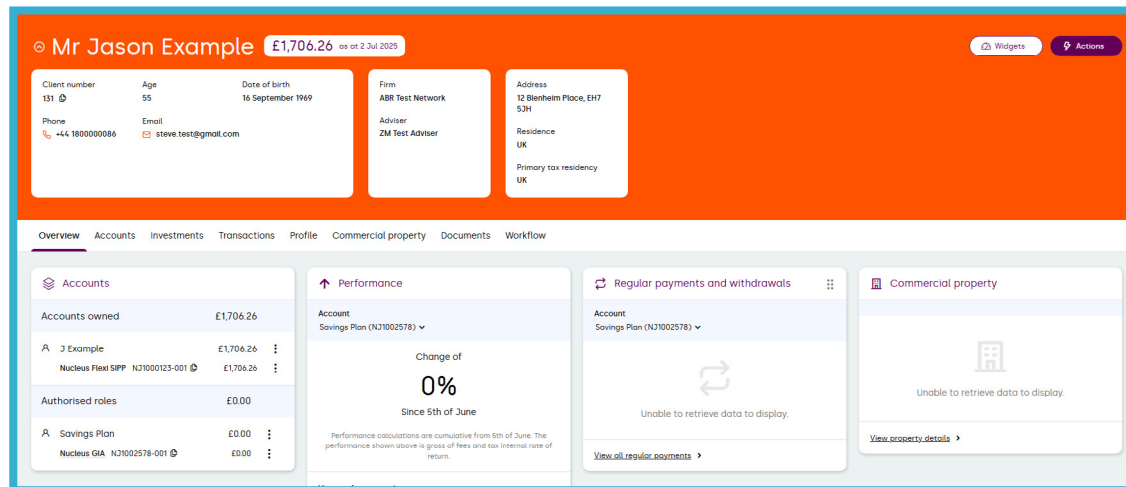


Useful info will look like this.



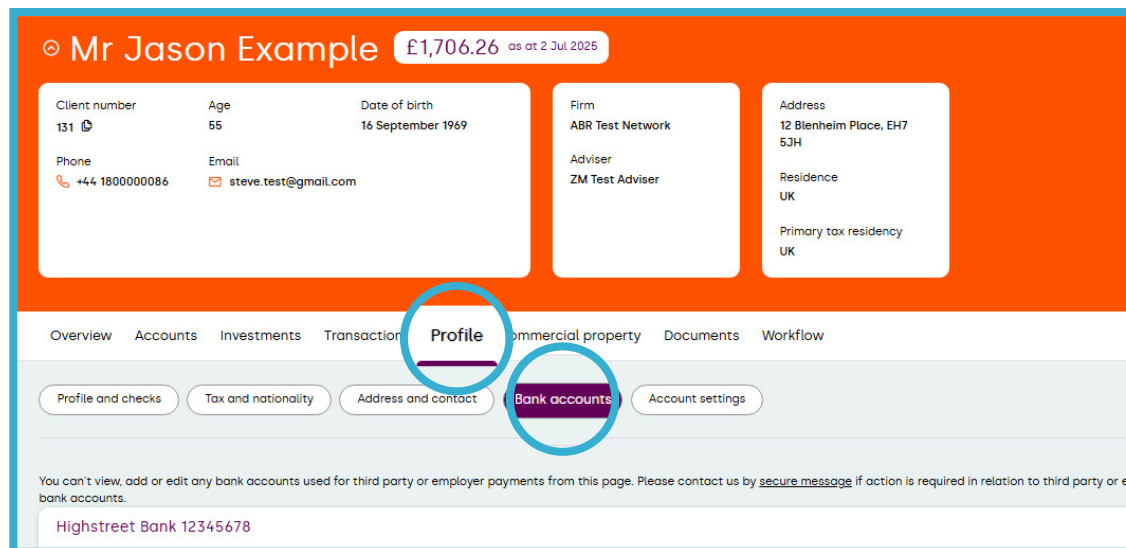
We recommend using the zoom function to view the details on the platform screens in this guide.

To start adding or removing your client's bank accounts you first need to find your client. Please refer to the guides on our website to search for a client.



From the client home page, navigate to the 'Profile' tab.

Within the profile tab, select the 'Bank accounts' button.



Adding a client bank account



Third party or employer bank accounts cannot be viewed or amended. You'll need to send a request by secure message.

Select **'Add another bank account'** at the bottom of the page.

Mr Jason Example £1,706.26 as at 2 Jul 2025

Client number 131	Age 55	Date of birth 16 September 1969	Firm ABR Test Network	Address 12 Blenheim Place, EH7 5JH
Phone +44 1800000086	Email steve.test@gmail.com		Adviser ZM Test Adviser	Residence UK
				Primary tax residency UK

Overview Accounts Investments Transactions Profile Commercial property Documents Workflow

Profile and checks Tax and nationality Address and contact **Bank accounts** Account settings

You can't view, add or edit any bank accounts used for third party or employer payments from this page. Please contact us by [secure message](#) if action is required in relation to third party bank accounts.

Highstreet Bank 12345678

Applicable to	All products		
NJ1000123			
Bank account		Bank	
Owner	Individual	Bank name	Highstreet Bank
Status	Active		
Sort code	12-34-56		
Account number	12345678		
Account name	Current Account		
Building society roll number			
Status			
Direct Debit instruction	Yes		
Nominated account for withdrawals?	Yes		

+ Add another bank account

Complete all your client's bank details.

Add new bank account ×

Bank account details

Non-UK bank accounts can't be set up through the platform. Please visit the Literature app to find the relevant form to download, complete and return to us for this bank account to be added.

Select an applicable account

J Example | NJ1000123

Visibility

Normal

Owner

Individual

Bank name

Example

Sort code

11 11 11

Account number

12345678

Building society roll number (optional)

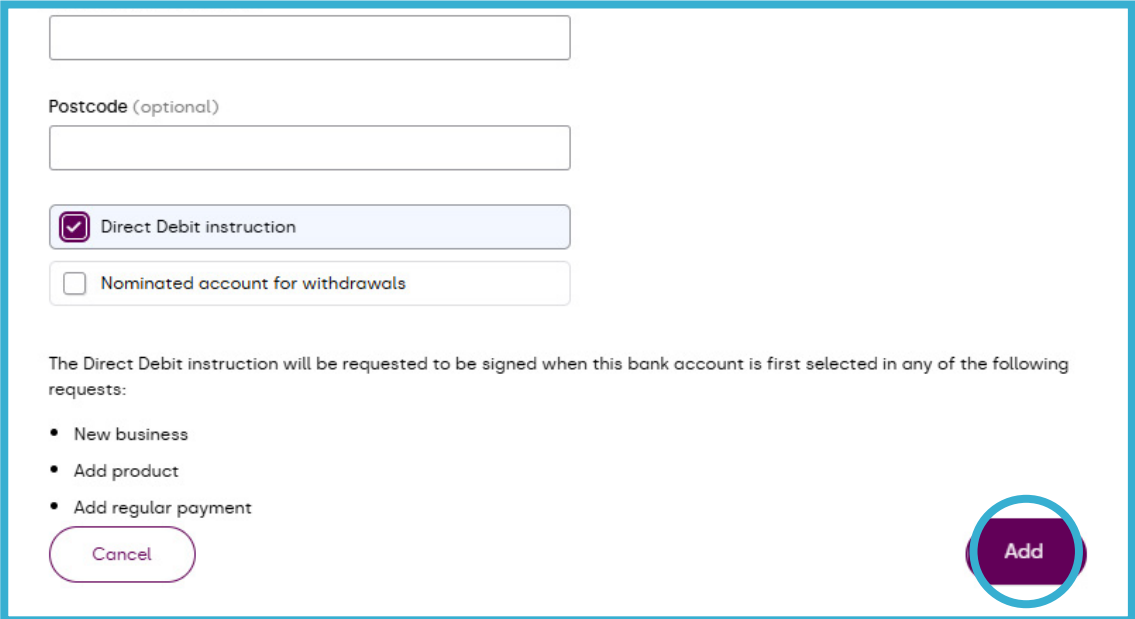
Account name

Example

Address line 1 (optional)

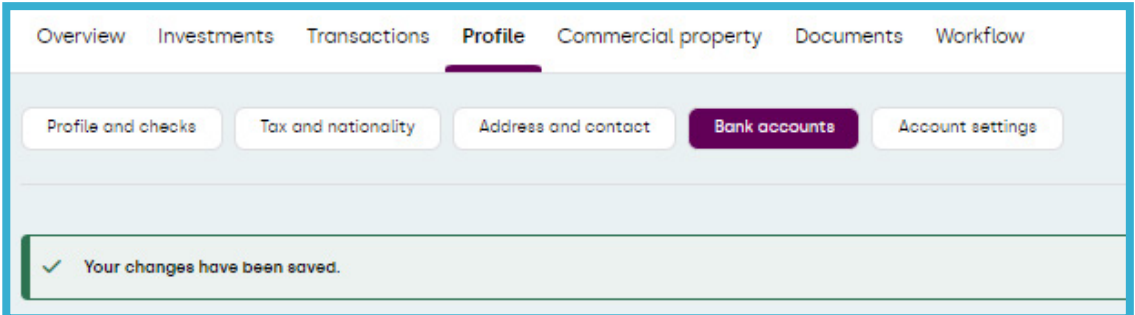
Confirm if the bank account is for '**Direct Debit instruction**' and/or a '**Nominated account for withdrawals**'.

Once you're happy with the details entered select '**Add**' to submit your client's bank details.



A screenshot of a web form for adding a bank account. It features a text input field at the top, followed by a 'Postcode (optional)' label and another text input field. Below these are two checkboxes: 'Direct Debit instruction' (checked) and 'Nominated account for withdrawals' (unchecked). A note states: 'The Direct Debit instruction will be requested to be signed when this bank account is first selected in any of the following requests:'. A bulleted list follows: 'New business', 'Add product', and 'Add regular payment'. At the bottom left is a 'Cancel' button, and at the bottom right is a purple 'Add' button circled in blue.

Confirmation that your changes have been saved will appear.



A screenshot of a user profile page. The navigation bar includes 'Overview', 'Investments', 'Transactions', 'Profile' (highlighted), 'Commercial property', 'Documents', and 'Workflow'. Below the navigation bar are five tabs: 'Profile and checks', 'Tax and nationality', 'Address and contact', 'Bank accounts' (highlighted), and 'Account settings'. A green confirmation message at the bottom reads: '✓ Your changes have been saved.'

Removing a client bank account

From the client home page, navigate to the **'Profile'** tab.

Within the profile tab, select the **'Bank accounts'** button.

All your client's existing bank accounts will appear.

Locate the account that is to be deleted and select the **'Bin'** icon.



You're unable to delete a bank account where there is a regular payment or withdrawal linked to it.

Overview Investments Transaction **Profile** Commercial property Documents Workflow

Profile and checks Tax and nationality Accounts and contact **Bank accounts** Account settings

✓ Your changes have been saved.

ⓘ You cannot view, add or edit any bank accounts used for third party or employer payments from this page. Please contact us by secure message if action is required in relation to third party or employer bank accounts.

Highstreet Bank 12345678 ⓘ

Applicable to NJ1000123 All sub accounts

Bank account	Bank
Owner Individual	Bank name Highstreet Bank
Status Active	
Sort code 12-34-56	
Account number 12345678	
Account name Current Account	
Building society roll number	

Status

Direct debit instruction	Yes
Nominated account for withdrawals?	Yes

bin 12345678 ⓘ

Applicable to NJ1000123 All sub accounts

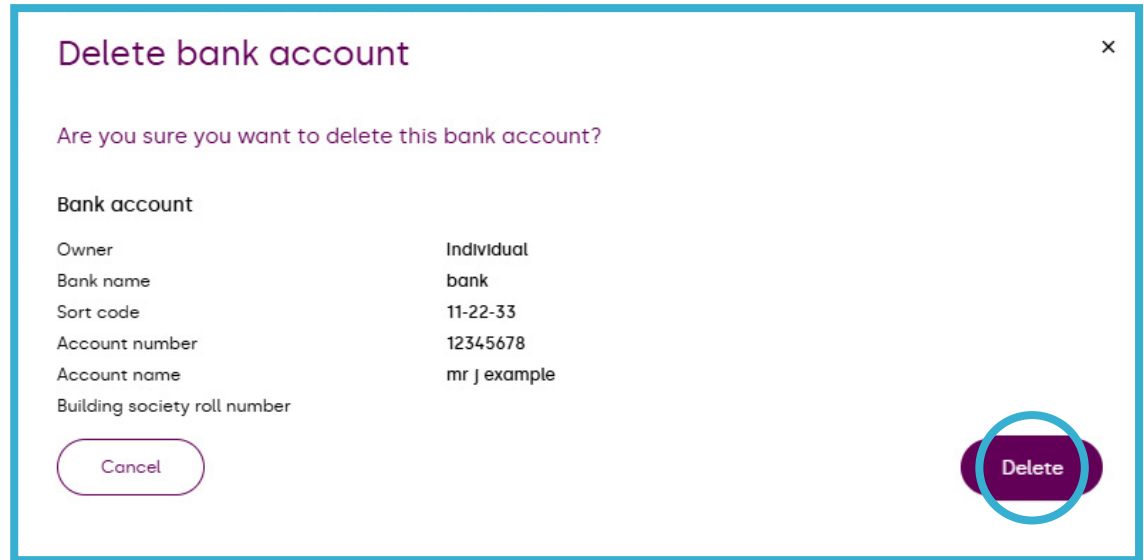
Bank account	Bank
Owner Individual	Bank name bank
Status Active	
Sort code 11-22-33	
Account number 12345678	
Account name mr j example	
Building society roll number	

Status

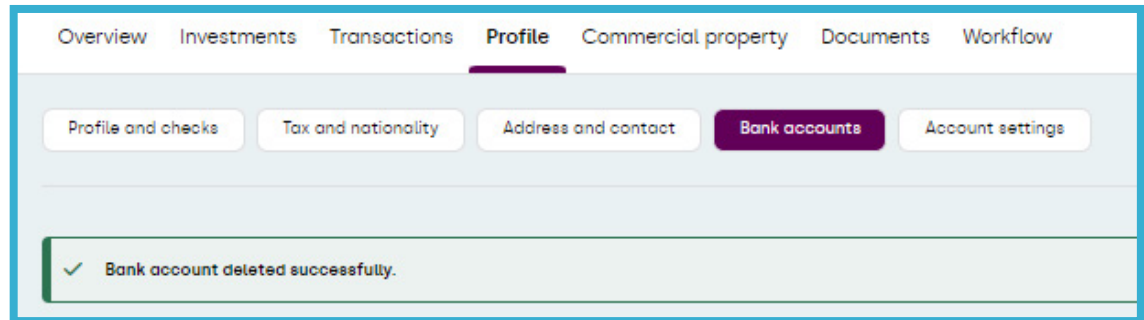
Direct debit instruction	Yes
Nominated account for withdrawals?	No


+ Add another bank account


Review the bank details to ensure you've selected the correct bank account. Then select '**Delete**'.




Confirmation that your changes have been saved will appear.



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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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