For advisers

Our new platform

nucleus platform

How to place a one-off or regular buy

3 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.

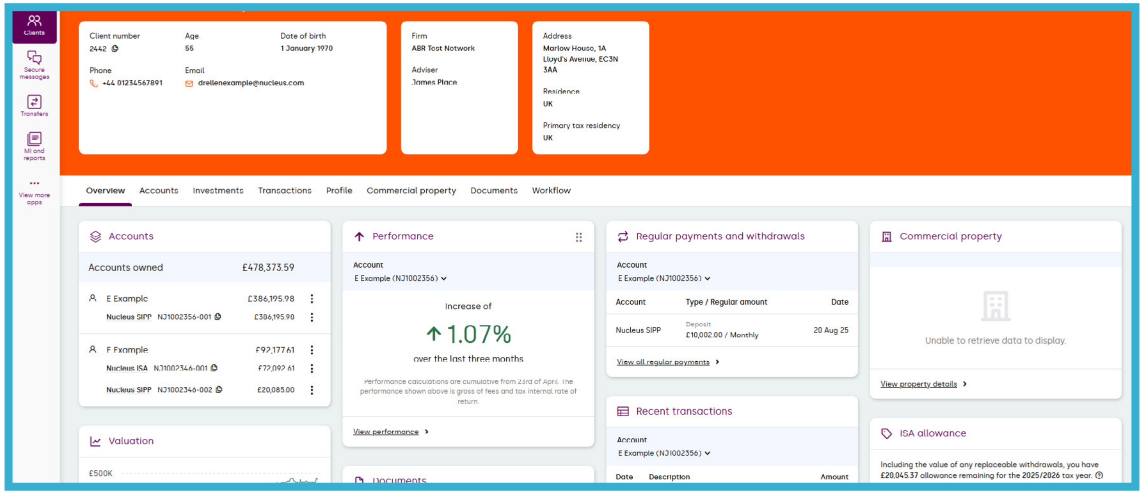
Useful info will look like this.

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

How to place a one-off or regular buy

To place the regular or one-off buy, 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 placing the buy instruction.

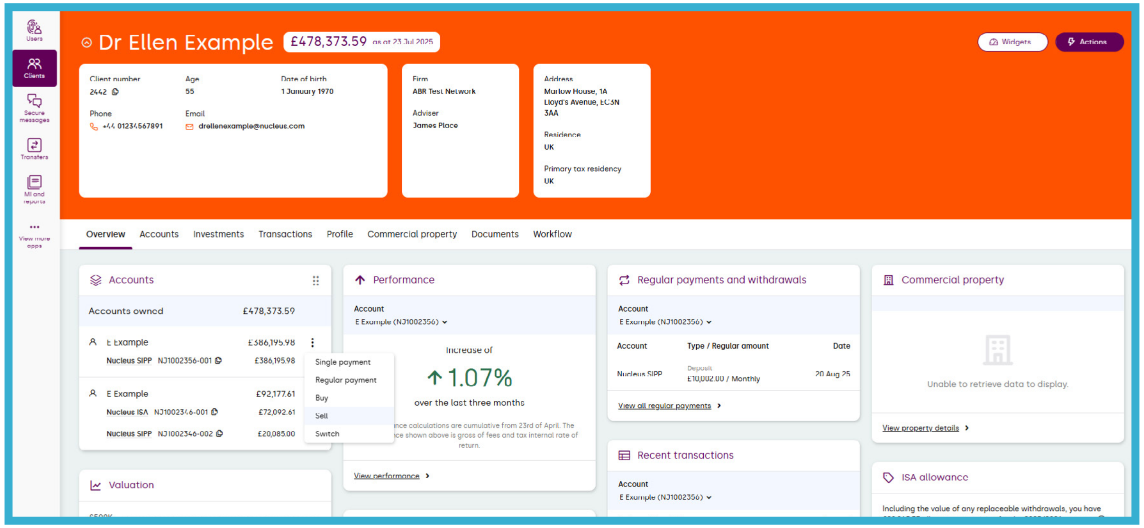


From the client home page, locate the relevant account and select the vertical ellipses (three dots).

A list of actions will appear. To place the buy, select ‘**Buy**’.

All trades will take place at the next available trading point for the asset, in line with our order execution policy.

Ensure there’s sufficient available cash to cover your buy order.

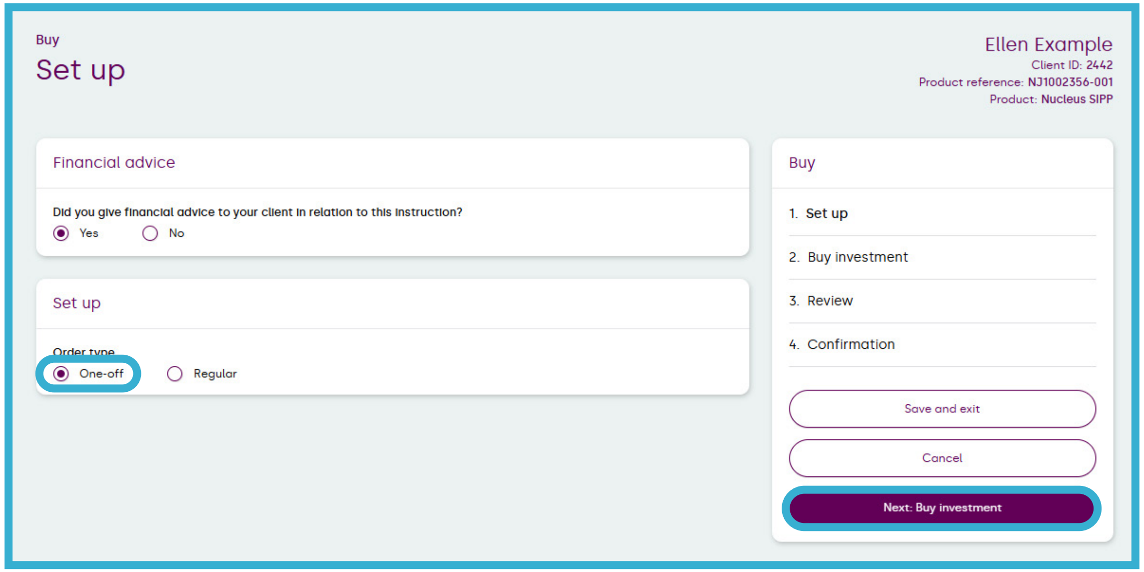


Placing a one-off buy

Confirm if financial advice has been provided to your client.

Select '**One-off**'.

Select '**Next: Buy investment**' to move on to the buy investment page.



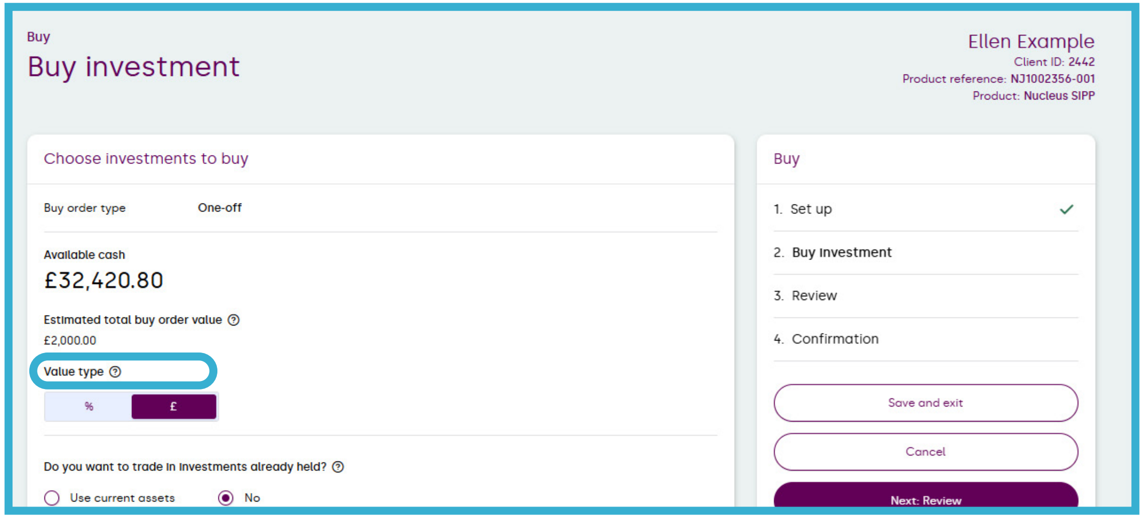
Key message

At any stage you can save and exit the session. To resume the session, navigate to the workflow tab within the client's account.

Buy investment

Select '**%**' or '**£**'. Please note, if a percentage is selected, you'll be required to specify the estimated total buy order value.

Confirm if you would like to use assets currently held on the account or new assets, as the investment choice.

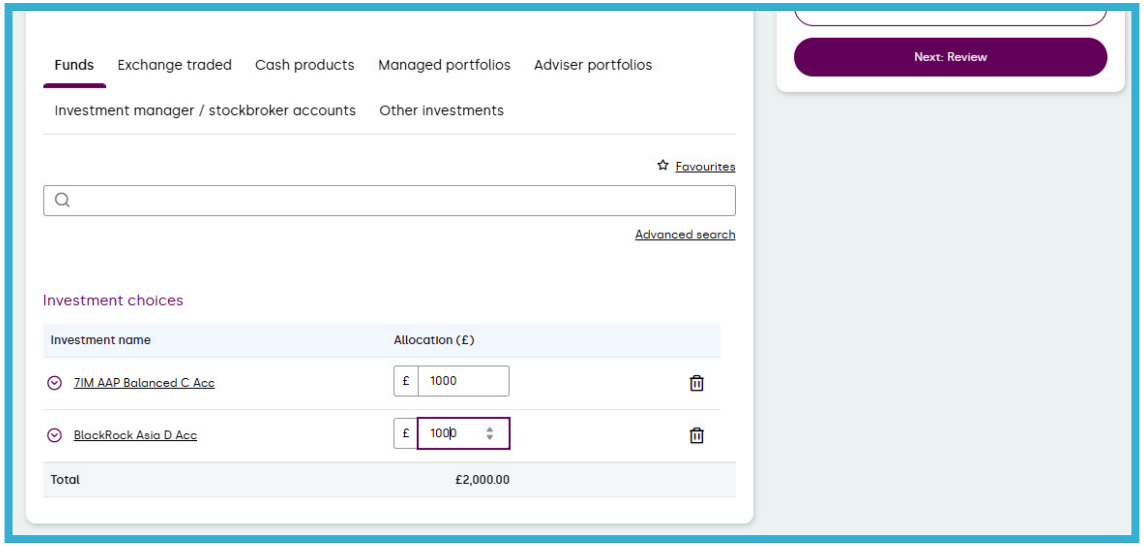


Key message

Selecting 'Use current assets' will show your current investment holdings without a percentage allocation for each investment.

If an investment you hold can't be purchased as part of this instruction, you won't be able to enter a value against it.

Your client can now hold loose assets, multiple model portfolios, ETIs, and other investments, all within the same account.



If you've selected new assets, enter the investment name into the search bar, then select the investment from the results.

If you've selected £, enter a monetary amount for each investment.

If you've selected %, enter a percentage amount for each investment.

The total must equal 100%.

If an investment manager (IM) has been selected, confirm the IM basis from the drop-down list.

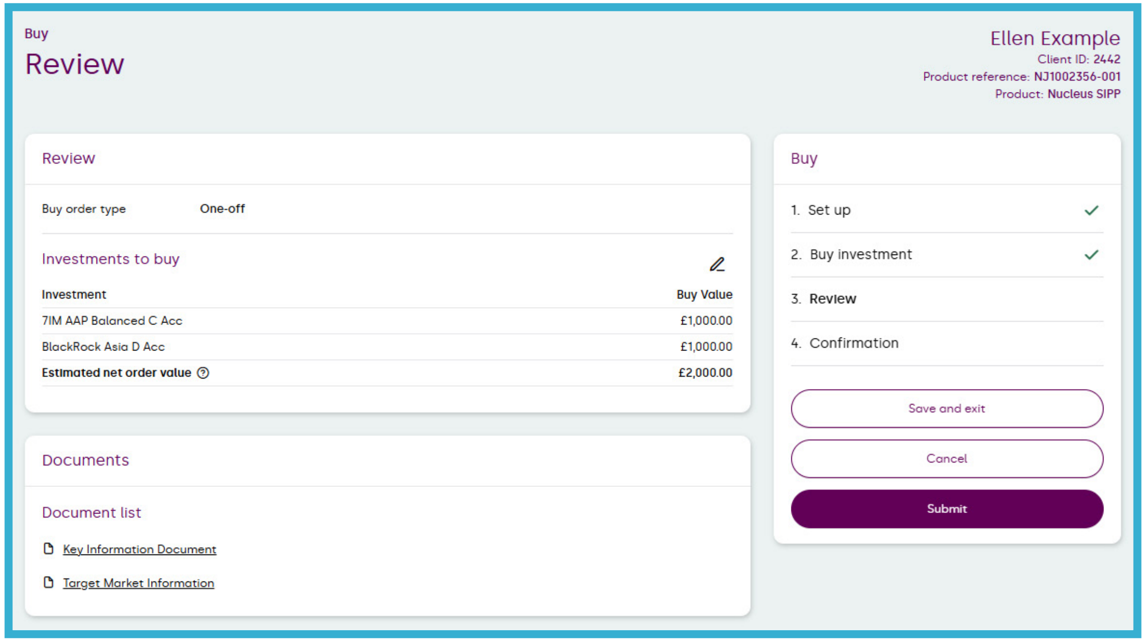
Select '**Next: Review**' to move on to the review page.

Review

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

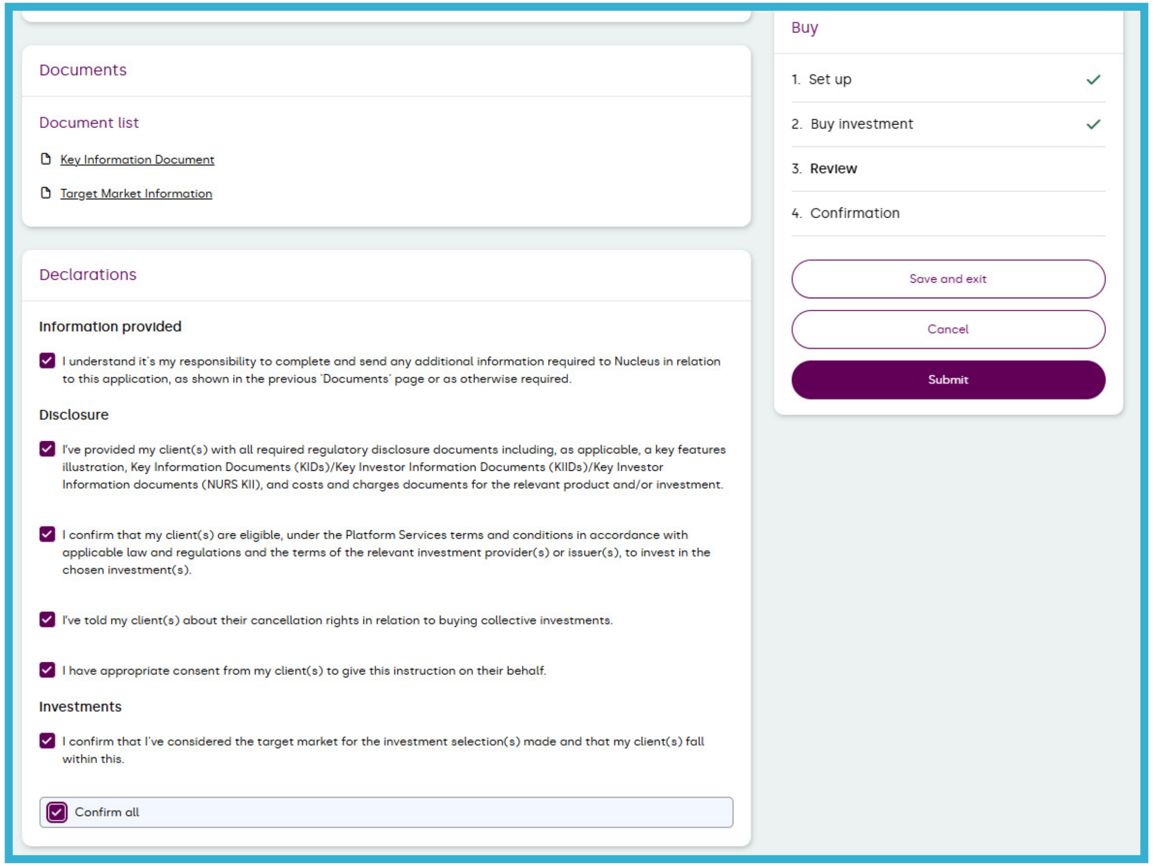
All relevant documents will be produced here.

Documents will be available to download from the documents library.



Read through the declarations and tick to confirm completion.

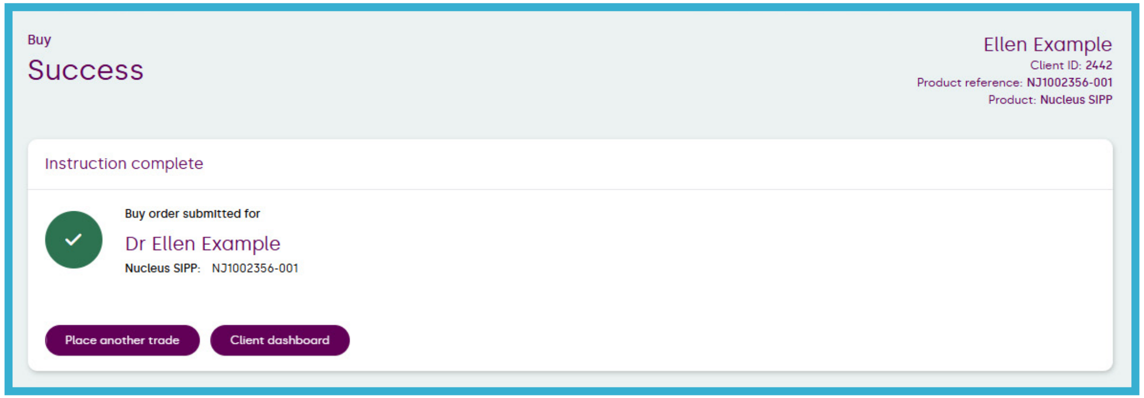
Select '**Submit**' to place the one-off buy.



Confirmation

The one-off buy instruction has been successfully submitted.

From here, you can place another trade or return to the client dashboard.



Placing a regular buy

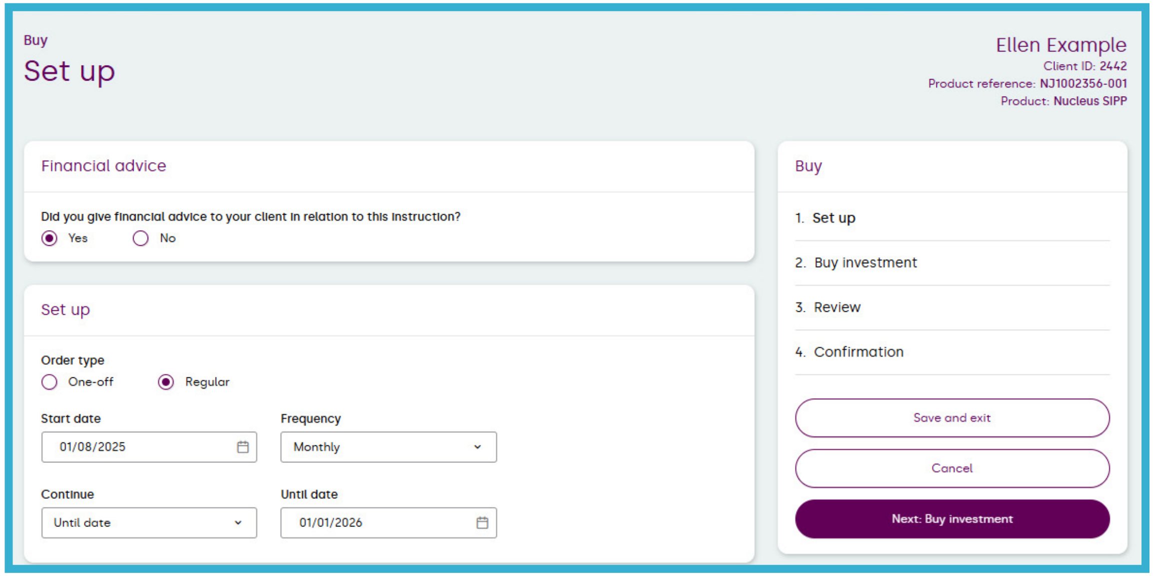
Confirm if financial advice has been provided to your client.

Select '**Regular**'.

Select a start date, frequency and the duration.

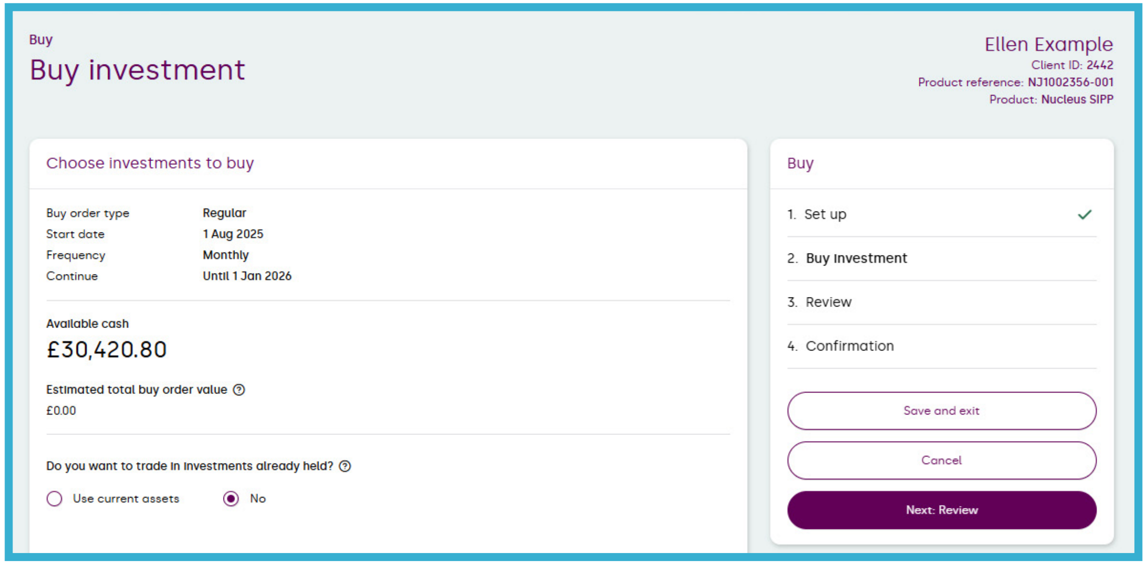
The start date can be any date from 1 - 28 of the month.

Select '**Next: Buy investment**' to move on to the buy investment page.



Buy investment

Confirm if you'd like to use assets currently held on the account or new assets, as the investment choice.



Key message

Selecting 'Use current assets' will show your current investment holdings without a percentage allocation for each investment.

If you've selected new assets, select the investment type across the headings shown.

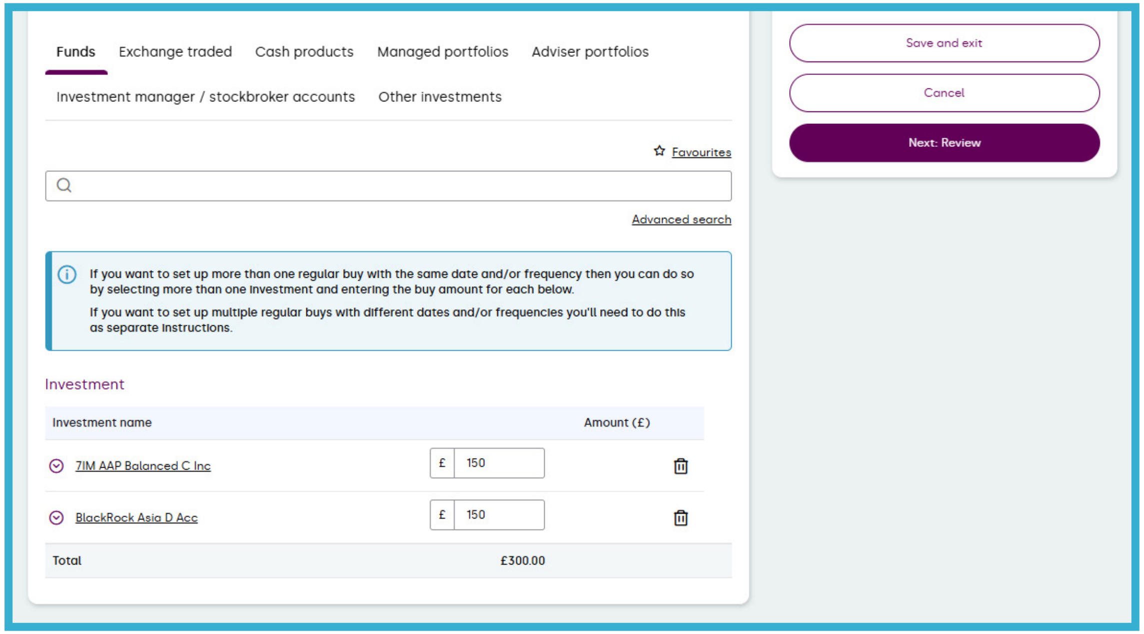
Your client can now hold loose assets, multiple model portfolios, ETIs, and other investments, all within the same account.

If you've selected new assets, enter the investment name into the search bar, then select the investment from the results.

Enter a monetary amount for each investment.

If an investment manager (IM) has been selected, confirm the IM basis from the drop-down list.

Select '**Next: Review**' to move on to the review page.

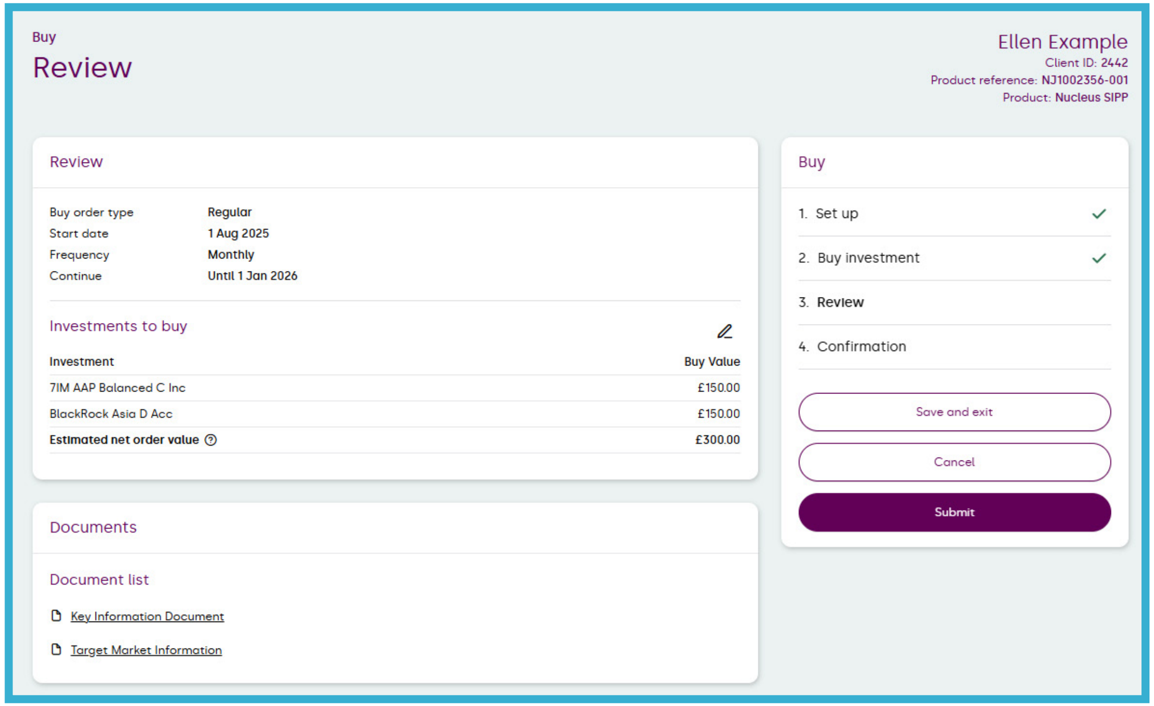


Review

Review the instruction details for accuracy. Use the ‘**pencil**’ icon to make any necessary changes.

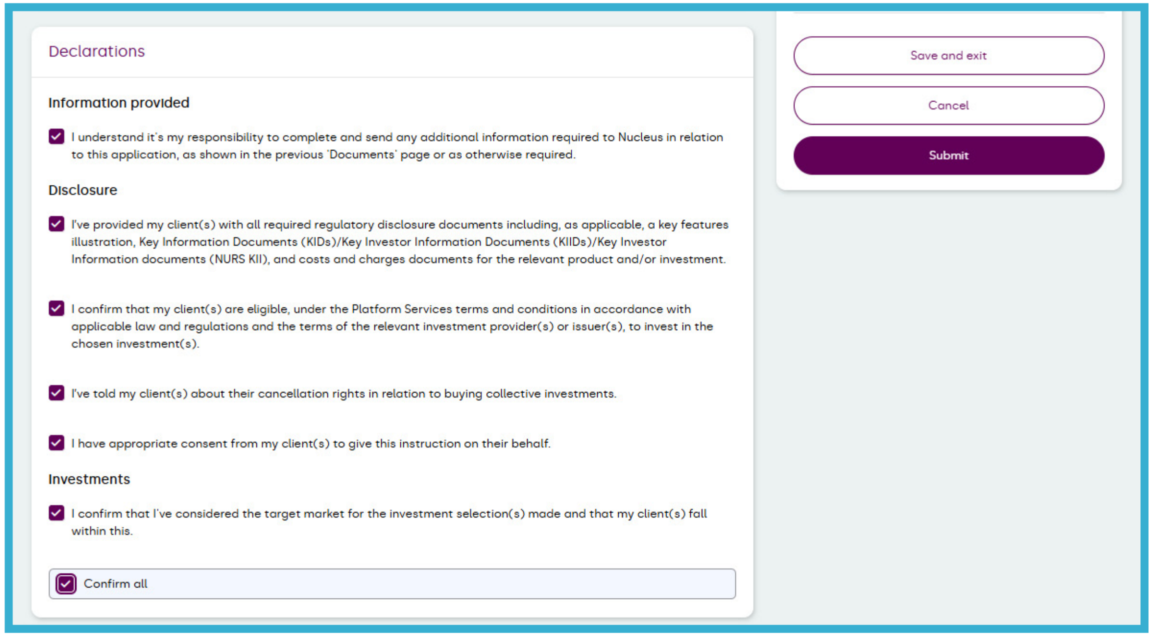
All relevant documents will be produced here.

Documents will be available to download from the documents library.



Read through the declarations and tick to confirm completion.

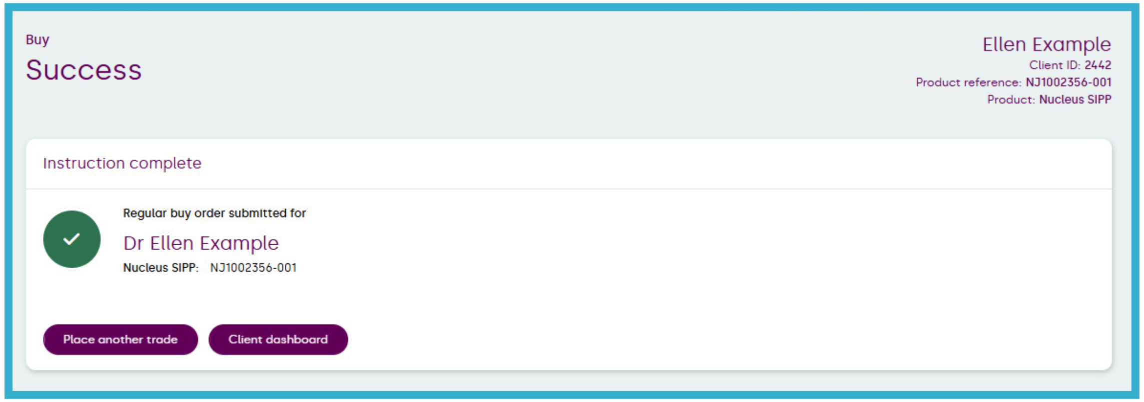
Select '**Submit**' to place the regular buy.



Confirmation

The regular buy instruction has been successfully submitted.

From here, you can place another trade or return to the client dashboard.



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