

For customers

Our new
platform

nucleus^o platform

How to add a single payment/ transfer

 3 minute read



How to add a single payment/transfer

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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 add a single payment/transfer

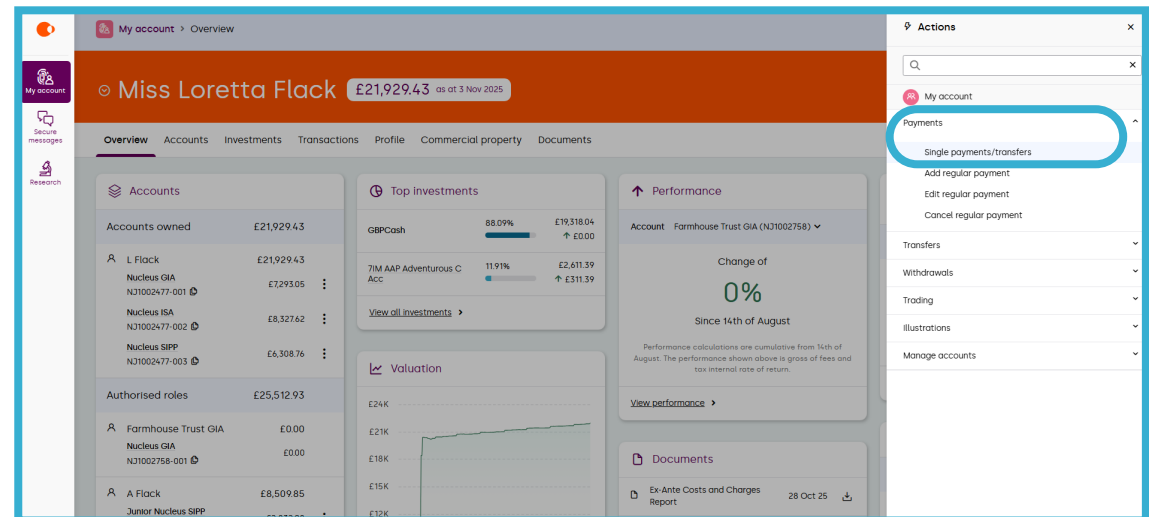
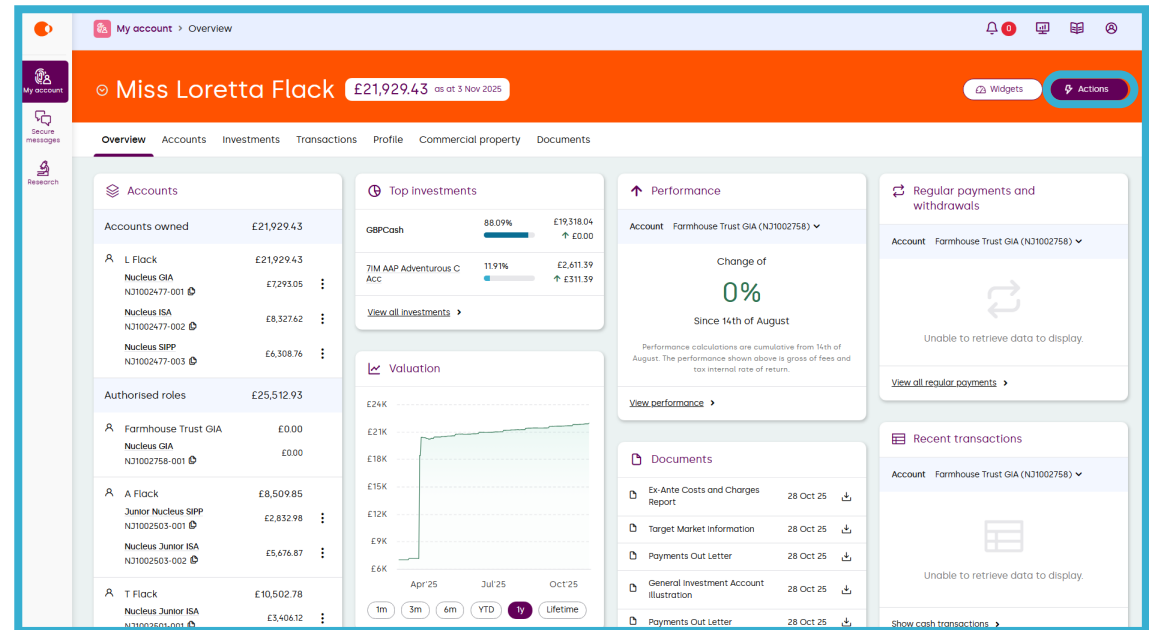
This process is the same for both a GIA and ISA. This guide follows the steps for an ISA product. Once logged into your account, you'll arrive at your homepage page.

There are two ways to access the application.

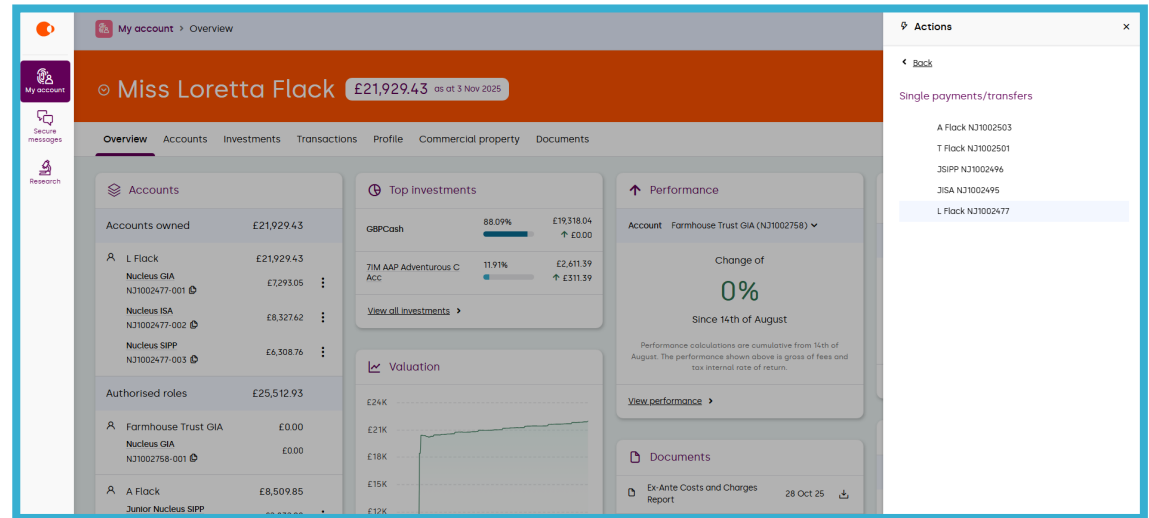
Option 1 – To make a single payment or transfer into an existing product, select the **'Actions'** button in the top righthand corner of the screen.

From the menu select **'Payments'**.

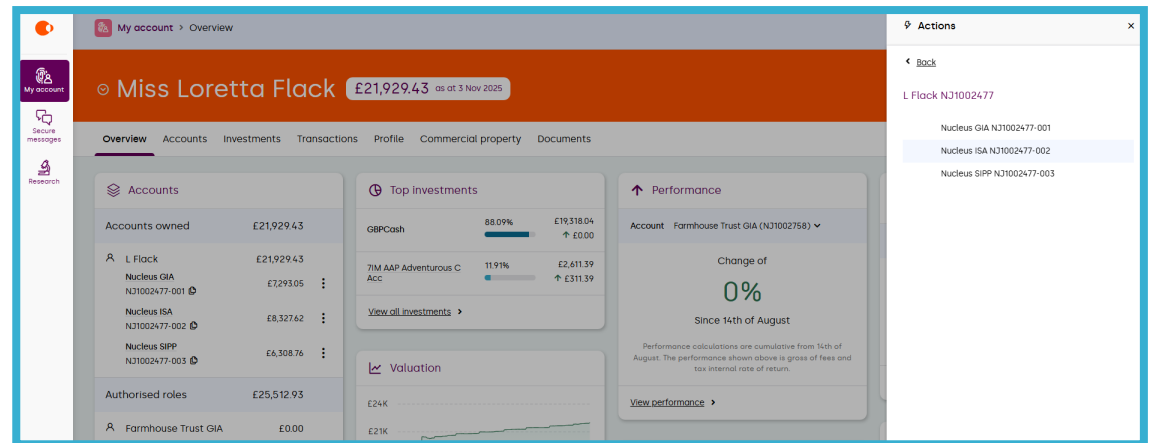
Then select **'Single payments/transfer'**.



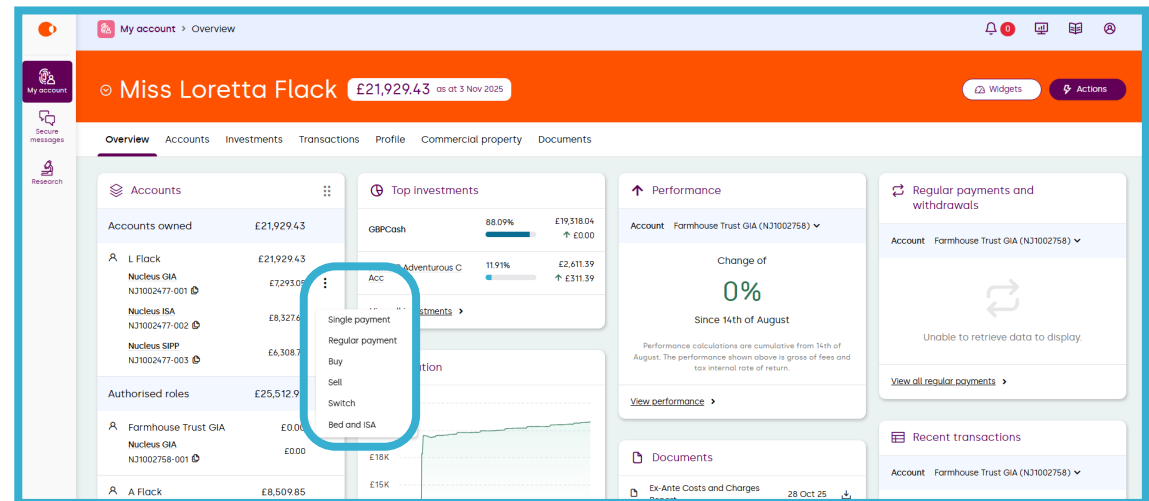
Select the account that holds the product you want to make a payment/transfer to. This may have multiple entries if you're linked to other accounts.



Next, choose the product you want to make a payment/transfer to.



Option 2 – You can select the vertical ellipsis (three dots) next to the product in the 'Accounts' widget to go directly to 'Payments in'. This route skips the account and product selection screens described above.



Payments in

Select **'Yes'** to add your payment.

Follow the details and add the amount into the **'Single payment'** box.

The **'Payment method'** will automatically be pre-populated to bank transfer.

nucleus

Single payment / transfer

Payments in

Loretta Flack
Client ID: 2879
Product reference: NJ1002477-002
Product: Nucleus ISA

Single payments in

Single payment

No Yes

i The single payment in should be made by bank transfer using the following details:

- Bank account name: Nucleus Financial Services Limited
- Sort code: 09-02-22
- Account number: 11095141
- Payment reference: Please use the Product reference number found at the top right of the screen, under the Client ID number.

Please ensure that you/the payer(s) knows to include the payment reference when making the payment to us.
If no payment reference is used or an incorrect reference is used this will delay the cash being made available in your account.

Your payment

Single payment

Payment method

£ 4000 Bank transfer

Single payments/transfers

1. Payments in
2. Investment selection
3. Review
4. Documents and declarations
5. Confirmation

Cancel

Continue

If you're simply adding a single payment, confirm the source of wealth from the dropdown list at the bottom of the page, and then select '**Continue**'.

The screenshot shows a multi-step form for adding a payment or transfer. At the top, a warning message states: "If no payment reference is used or an incorrect reference is used this will delay the cash being made available in your account." The form is divided into several sections:

- Your payment:** Includes a "Single payment" field with a currency symbol (£) and the value "4000", and a "Payment method" dropdown menu currently set to "Bank transfer".
- Transfers:** Features a "Transfer in" section with radio buttons for "No" (selected) and "Yes". Below this is a yellow warning box with an information icon and the text: "You must sign a transfer authority form for each transfer."
- ISA allowance:** A text box stating: "Including the value of any replaceable withdrawals, you have £16,500 allowance remaining for the 2025/2026 tax year." with a small information icon.
- Source of wealth:** A dropdown menu labeled "Source of wealth" with the placeholder text "Please select".

On the right side of the form, a vertical progress indicator lists the steps: "2. Investment selection", "3. Review", "4. Documents and declarations", and "5. Confirmation". Below the progress indicator are two buttons: a light purple "Cancel" button and a dark purple "Continue" button.

To add a transfer, select **'Yes'** in the Transfers box.

Type the name of the ISA provider into the **'Transferring Scheme'** box and select the name from the dropdown list.

You can add the provider manually if it does not appear in the list.

Choose the **'Transfer type'**, **'Cash'** or **'Re-register assets'**.

Continue to complete all fields of the Transfer section.

Key message

For each transfer, you must complete a transfer authority form available at the end of the application as well as in the 'documents' tab located on your overview page. This will need to be sent to us if the provider cannot make an electronic transfer.

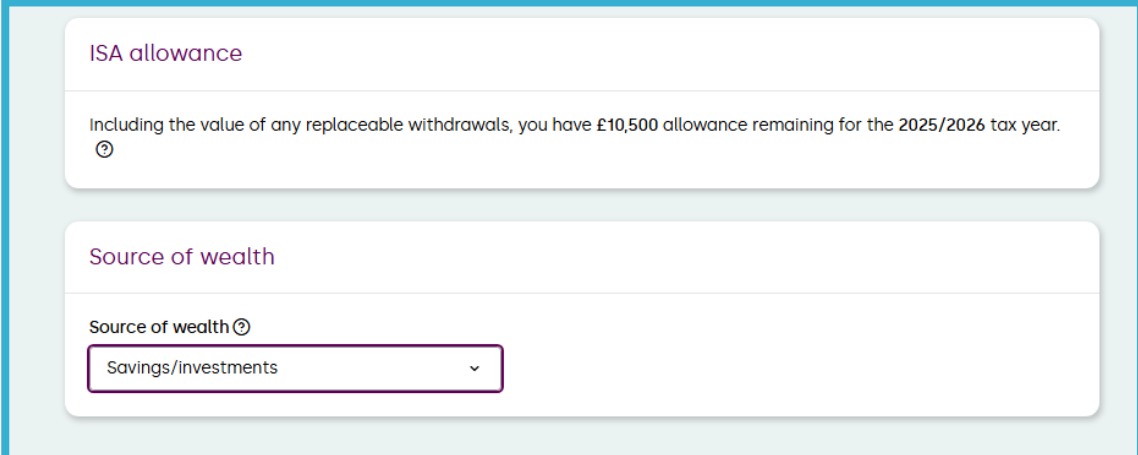
The system will confirm if the provider does not support electronic transfers.

Select **'Add another transfer'** to add multiple transfers.

The ISA allowance box will automatically calculate your remaining ISA allowance.

Select the source of wealth from the dropdown menu.

Once complete, select '**Continue**' to move onto the Investment selection page.



The screenshot shows a form with two main sections. The first section is titled 'ISA allowance' and contains the text: 'Including the value of any replaceable withdrawals, you have £10,500 allowance remaining for the 2025/2026 tax year.' Below this text is a small circular icon with a question mark. The second section is titled 'Source of wealth' and contains a dropdown menu labeled 'Source of wealth' with a question mark icon. The dropdown menu is currently set to 'Savings/investments' and has a small downward arrow on the right side.

Investment selection

Select **'use current assets'** for payments to be invested in your current choice, displayed at the bottom of the screen.

Or select **'No'** to search for a new investment in the search box.

Enter the amounts in the **'Investment choices'** section in percentages to equal 100%.

When you're happy, select **'Continue'** to move onto the review page.

The screenshot shows the 'Investment selection' screen in the Nucleus app. At the top, the Nucleus logo is on the left, and the client's name 'Loretta Flack' with ID '2879' and product reference 'NJ1002477-002' is on the right. The main heading is 'Single payment / transfer' followed by 'Investment selection'. Below this, there's a question 'Do you want to trade in investments already held?' with two radio button options: 'Use current assets' (selected) and 'No'. Underneath are tabs for 'Funds', 'Exchange traded', and 'Other investments'. A search bar with a magnifying glass icon and a 'Favourites' star icon is present, along with an 'Advanced search' link. The 'Investment choices' section contains a table with columns for 'Investment name' and 'Single + Cash transfer'. The table lists 'Cash' at 5% and '7IM AAP Adventurous C Acc' at 95%, with a 'Total' row showing 100%. A trash icon is next to the second investment choice. On the right side, a 'Single payments/transfers' summary panel shows a progress list: '1. Payments in' (checked), '2. Investment selection' (current step), '3. Review', '4. Documents and declarations', and '5. Confirmation'. At the bottom of this panel are 'Cancel' and 'Continue' buttons.

Investment name	Single + Cash transfer
Cash	5 %
7IM AAP Adventurous C Acc	95 %
Total	100%

Review

Carefully review the details. You can use the pencil icon to make any amendments.

Then select '**Continue**' to move onto the documents and declarations page.

Single payment / transfer

Review

Loretta Flack
Client ID: 2879
 Product reference: NJ1002477-002
 Product: Nucleus ISA

Nucleus ISA

Single payments in ✎

Your single payment

Amount	£4,000.00
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Transfer 1 ✎

Transferring scheme	HSBC Bank Cash ISA (Please Inc Sort Code)
Electronic transfer supported	No
Transfer type	Cash
Estimated current value	£6,000.00
Transferring account number	12345678
Full or partial transfer	Full
Transfer from Flexible ISA	No
Subscriptions included in the transfer	Current tax year
Subscriptions made into ISA in the current year	£6,000.00

Investment selection ✎

Investment	Allocation
Cash	5%
7IM AAP Adventurous C Acc	95%
Total	100%

Single payments/transfers

1. Payments in ✓
2. Investment selection ✓
3. **Review**
4. Documents and declarations
5. Confirmation

Cancel

Continue

Documents and declarations

Here you can download each supporting document using the respective links. Documents will also be available in the 'Documents' tab back at your overview page, once payment/transfer is complete.

Please read the information and decide if you want to waive your right to cancel the application.

The screenshot shows the Nucleus ISA application interface. At the top, there is a red header with the 'nucleus' logo. Below the header, the page title is 'Single payment / transfer' and 'Documents and declarations'. On the right side, the user's name 'Loretta Flack' is displayed, along with 'Client ID: 2879', 'Product reference: NJ1002477-002', and 'Product: Nucleus ISA'. The main content area is divided into two columns. The left column is titled 'Documents and declarations' and contains two sections: 'Documents to be completed and sent to us by secure message' with links for 'Transfer-Form', 'Ex-Ante Costs and Charges Disclosure', 'Target Market Information', and 'Key Investor Information Document'; and 'Supporting documents' with a link for 'ISA Illustration'. The right column is titled 'Single payments/transfers' and contains a list of five steps: '1. Payments in' (checked), '2. Investment selection' (checked), '3. Review' (checked), '4. Documents and declarations' (current step), and '5. Confirmation'.

The screenshot shows the 'ISA - Your right to cancel' section of the application. The title is 'ISA - Your right to cancel'. The text reads: 'You have a right to cancel this application. Once you've submitted this application and it's been accepted by us, we'll send you a cancellation notice. This confirms that you have 30 days from receipt of the notice to let us know that you've changed your mind and wish to cancel this application and any associated transfers you've requested as part of this application. As you've not received any financial advice before applying, we will not permit you to invest any cash paid in or transferred in during your 30-day cancellation period, in case you decide to cancel. However, you do have the option to waive your right to the 30-day cancellation period. If you choose to waive your right, then:'. Below this text is a bulleted list: '• You will waive your right to cancel this application (including any transfers in you have requested).', '• The cash received from your payments in or transfer(s) in will be available for immediate investment in line with your instructions.' At the bottom, there is a question: 'Do you wish to waive your right to cancel?' with two radio button options: 'Yes' and 'No'.

Read and confirm your agreement to all declarations.

You can select '**Confirm all**', which ticks all boxes at once.

If you're happy to continue, select '**Submit**' to proceed with the application.

Declarations

Information provided

- I acknowledge and accept that if any information supplied in this application and/or associated documentation is incorrect or incomplete, this may delay the application and any associated transfers.
- I understand that I'm required to complete and provide any documentation detailed in the Documents and declarations section of the application and provide any subsequent information that may be requested of me to complete my application.

Financial advice

- I acknowledge that Nucleus hasn't provided me with any form of advice relating to my application or any investments and has no responsibility to do so (including in the future).

Investments

- I authorise Nucleus and its agents to deal directly with the providers and issuers of investments held and their agents in order to carry out my investment instructions.
- I understand that all trading will be carried out in line with the Instruction Transmission Policy. A copy of which can be obtained at nucleusfinancial.com.
- I accept that Nucleus won't assess me against an investment manufacturers' target market when I choose the investments I want to purchase. I accept that I'm responsible for considering the investment manufacturer's target market before making an investment decision.
- I confirm that I'm eligible, under the Nucleus Platform Service terms and conditions that apply to me, to invest in the chosen investment(s).

Transfers

- I instruct the transferring provider to pay any distribution and/or tax credits directly to me, if they're received after the date of the transfer.
- I understand and accept that I'll be responsible for any costs and/or losses incurred should I provide inaccurate and/or incorrect information or fail to provide documentation in order to complete the application I've submitted.

Confirm all

Single payments/transfers

1. Payments in ✓
2. Investment selection ✓
3. Review ✓
4. Documents and declarations
5. Confirmation

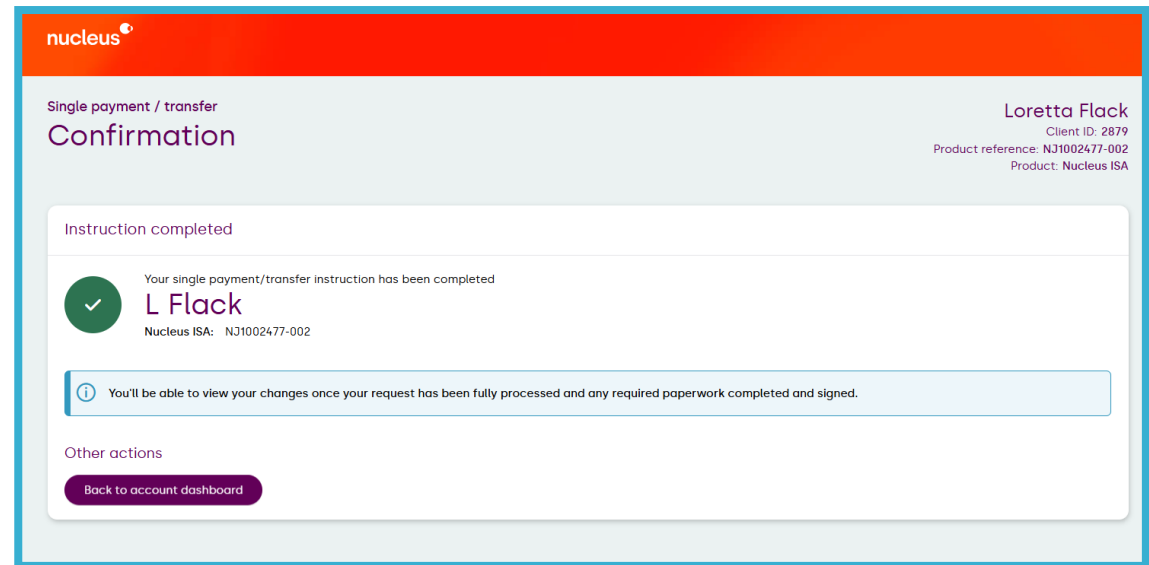
Cancel


Submit

Confirmation


A confirmation screen will appear to advise the application has been fully submitted.

You'll receive an email with further instructions confirming next steps.



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 ask@nucleusfinancial.com

 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 Typetalk service on 18001 03455 212 414.

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