

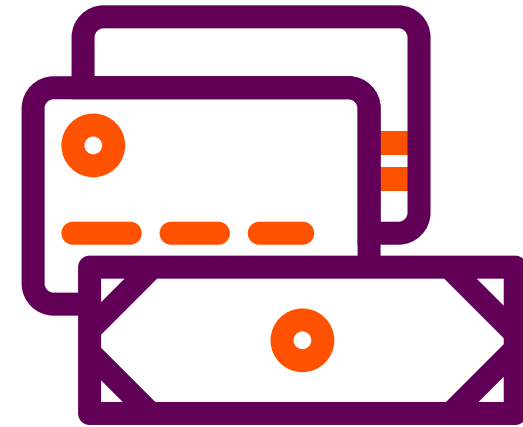
For customers

Our new  
platform

# nucleus<sup>o</sup> platform

## How to make a single withdrawal

🕒 2 minute read



# How to make a single withdrawal

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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.

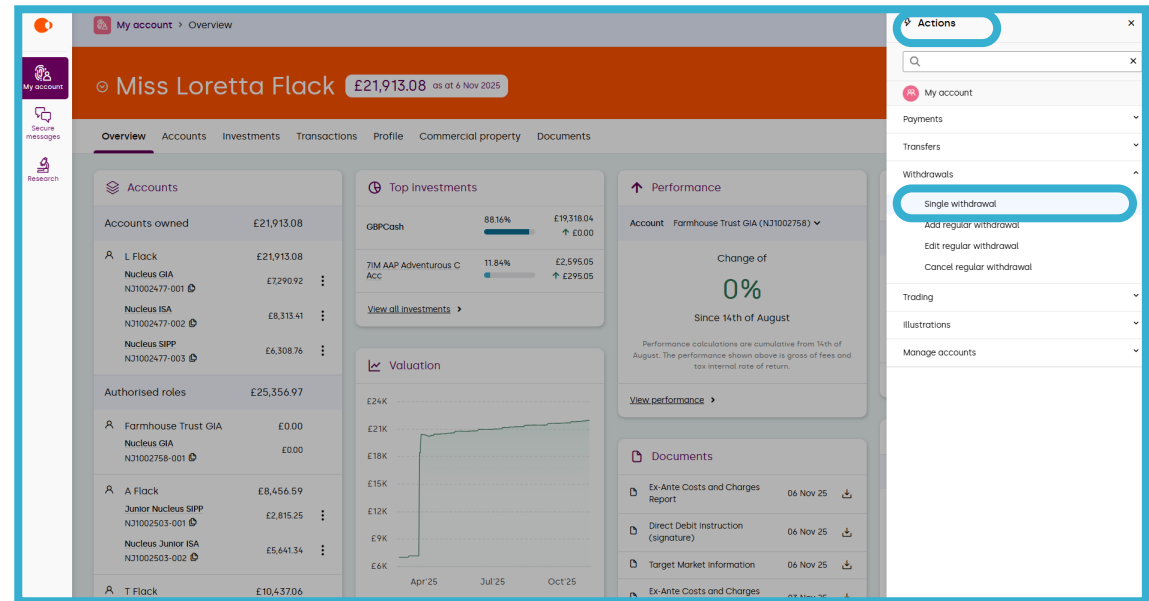
 We recommend using the zoom function to view the details on the platform screens in this guide.

## How to make a single withdrawal

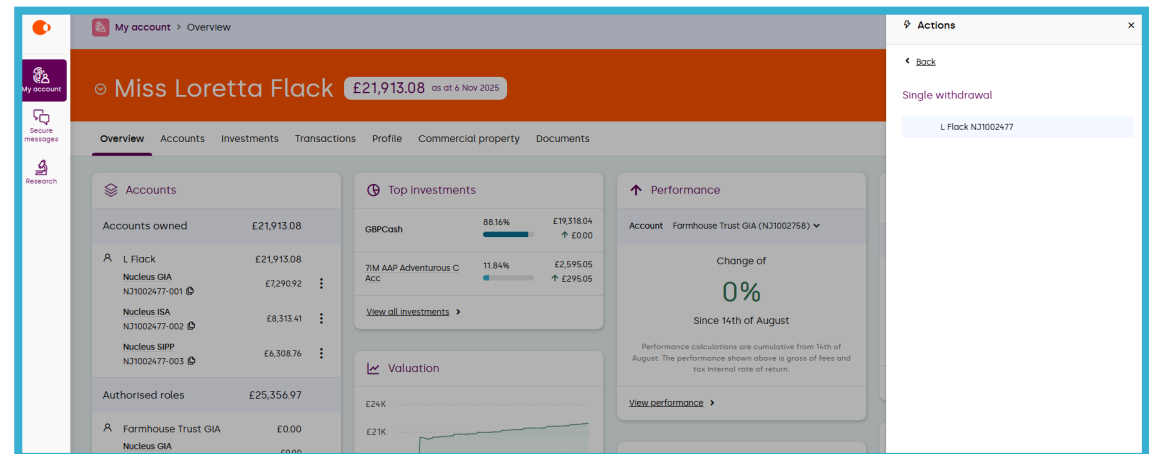
This process is the same for both a GIA and ISA. This guide follows the steps for a GIA product.

Once logged into your account, you'll arrive at your overview page.

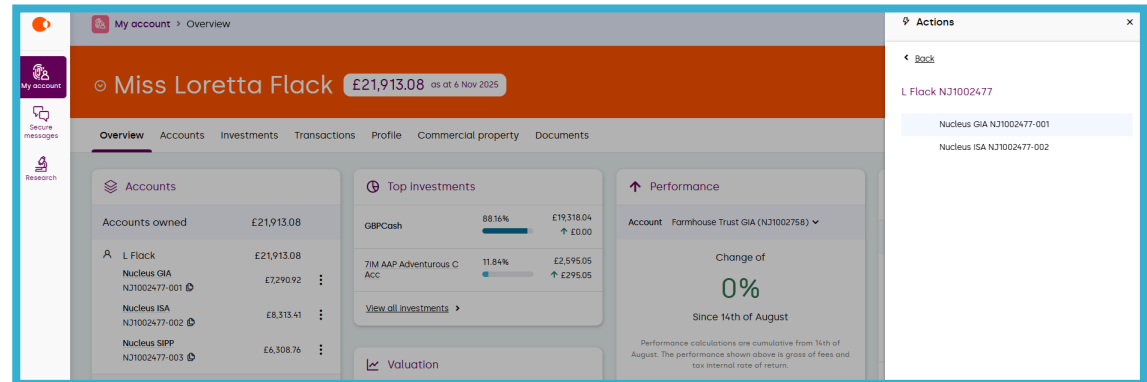
To make a single withdrawal, select the **'Actions'** button in the top righthand corner of the screen. Then select **'Single withdrawal'**.



Select the account to make the withdrawal from.



Then select the product you'd like to withdraw funds from.

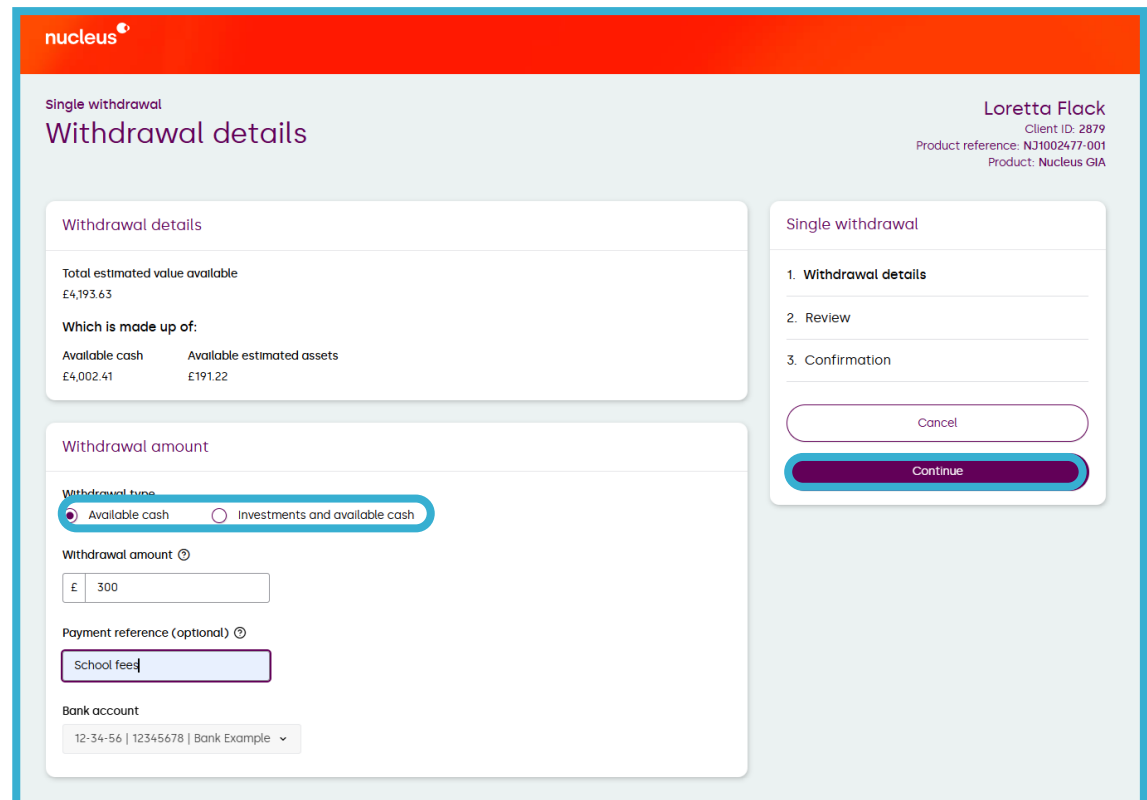


## Withdrawal details

Confirm if you want to withdraw from **'Available cash'** or **'Investments and available cash'**.

If selecting **'Available cash'**, enter the **'Withdrawal amount'** and add a **'Payment reference'** if required.

Check the bank account is correct and then select **'Continue'**.



You can add an additional bank account back on your overview page, under the **'Profile'** tab, and then select **'Bank accounts'**.

If you choose 'Investments and available cash', you'll need to 'Specify amount' or 'Specify investments/cash.'

If you select 'Specify amount', you can tell us how much you want to withdraw and then select the cash and investments below, that you wish to be used to make this withdrawal.

If you select 'Specify investments/cash', you can tell us which investments/cash you want to sell. The amount of the withdrawal will then be the total value of the investments/cash you select.

**Withdrawal amount**

Withdrawal type  
 Available cash  Investments and available cash

Withdrawal amount option ⓘ  
 Specify amount  Specify investments / cash

Withdrawal amount ⓘ  
£ 300

Payment reference (optional) ⓘ  
School fees

Bank account  
12-34-56 | 12345678 | Bank Example ▾

**Investments to sell**

Investment name	Available to sell	Value to withdraw ⓘ	Sell all ⓘ
Cash	£4,002.41	£ 0300	<input type="checkbox"/>
<u>7IM AAP Adventurous C Acc</u>	£191.22	£ 0	<input type="checkbox"/>
<b>Total</b>		<b>£300.00</b>	

1. Withdrawal details  
2. Review  
3. Confirmation

Cancel

Continue

Enter the withdrawal amount and a reference if required.

Check the bank account is correct.

Confirm investments to sell and the withdrawal amounts.

### Key message

Where investments are sold in a GIA to make withdrawals, they will be a disposal for Capital Gains Tax (CGT) purposes. This means there may be tax to pay through the HMRC self-assessment process.

#### Withdrawal amount

**Withdrawal type**

Available cash   
  Investments and available cash

**Withdrawal amount option** ⓘ

Specify amount   
  :

**Withdrawal amount** ⓘ

£ 300

**Payment reference (optional)** ⓘ

School fees

**Bank account**

12-34-56 | 12345678 | Bank Example ▾

If you select 'Specify amount', you can tell us how much you want to withdraw and then add the amount of cash below.

If you select 'Specify investments/cash', you can tell us which investments you want to sell and how much cash you want to withdraw. The amount of the withdrawal will then be the total value of the investments/cash you select.

#### Investments to sell

Investment name	Available to sell	Value to withdraw ⓘ	Sell all ⓘ
Cash	£4,002.41	£ 0250	<input type="checkbox"/>
7IM AAP Adventurous C Acc	£191.22	£ 050	<input type="checkbox"/>
<b>Total</b>		<b>£300.00</b>	

**1. Withdrawal details**

---

2. Review

---

3. Confirmation

---

Cancel

Continue

## Review

Review the withdrawal details for accuracy. You can make any changes using the 'pencil' icons.

**nucleus**

### Single withdrawal Review

Nucleus GIA

**Withdrawal details**

Withdrawal type	<b>Investments and available cash</b>
Withdrawal amount option	<b>Specify amount</b>
Withdrawal amount	<b>£300.00</b>
Reference	<b>School fees</b>
Payment method	<b>Faster</b>
Bank account	<b>12-34-56   12345678   Miss L Flack</b>
Available cash	<b>£4,002.41</b>
Available estimated assets	<b>£191.22</b>
Total estimated value available	<b>£4,193.63</b>

**Investments to sell**

Investment name	Current value	Value to withdraw
Cash	£4,002.41	£250.00
7IM AAP Adventurous C Acc	£191.22	£50.00
<b>Total</b>		<b>£300.00</b>

**Supporting documents**

[GIA Illustration](#)

Download the illustration for information purposes.

Read the declarations and tick to confirm completion.

Select '**Submit**' to proceed with the withdrawal.

Investment name	Current value	Value to withdraw
Cash	£4,002.41	£250.00
7IM AAP Adventurous C Acc	£191.22	£50.00
<b>Total</b>		<b>£300.00</b>

**Supporting documents**

[GIA Illustration](#)

**Declarations**

**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 confirm that Nucleus is instructed to sell, or arrange the sale of, the assets I've specified (or all assets if I'm making a full withdrawal) and to pay the proceeds to me and that once that payment is made, Nucleus has no further obligations to me in respect of the withdrawn funds.

Confirm all

**3. Confirmation**

[Cancel](#)

[Submit](#)

## Confirmation

The single withdrawal has now been submitted.

nucleus

Single withdrawal

**Confirmation**


Loretta Flack  
Client ID: 2879  
Product reference: NJ1002477-001  
Product: Nucleus GIA

Instruction complete


Your Single withdrawal instruction has been submitted

**Miss Loretta Flack**  
Nucleus GIA: NJ1002477-001

[Back to dashboard](#)

 03455 212 414

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 [nucleusfinancial.com](https://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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