For customers

Our **new** platform

nucleus
platform

How to create a new SIPP illustration

4 Minute read

How to create a new SIPP illustration

How to use this document

Important information will look like this.

Key messages

Key messages will look like this.

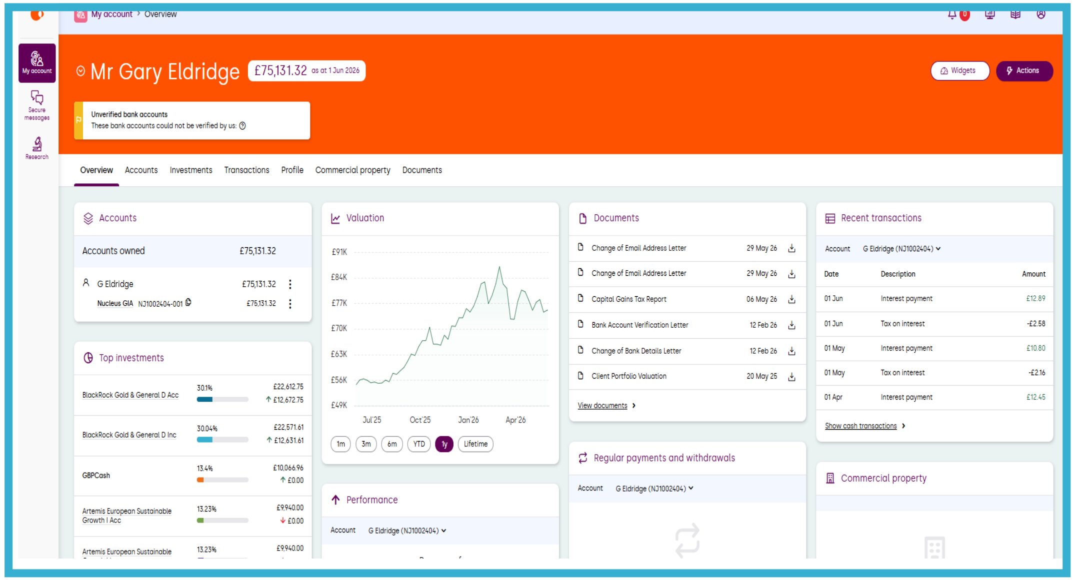
Useful info will look like this.

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

How to create an Illustration

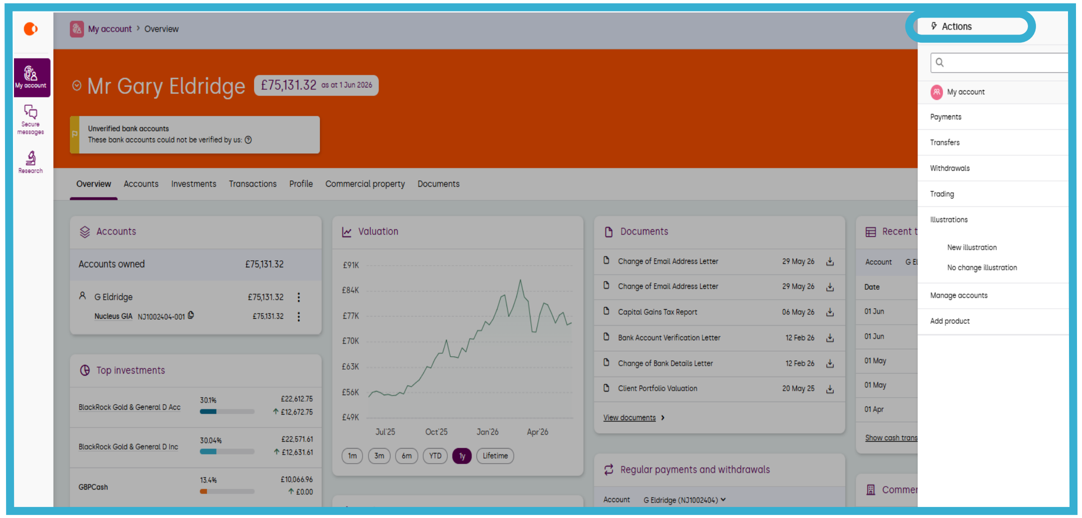
Before following this guide please ensure you've created an online account.

Once you've logged into your account, you'll arrive at the Overview page

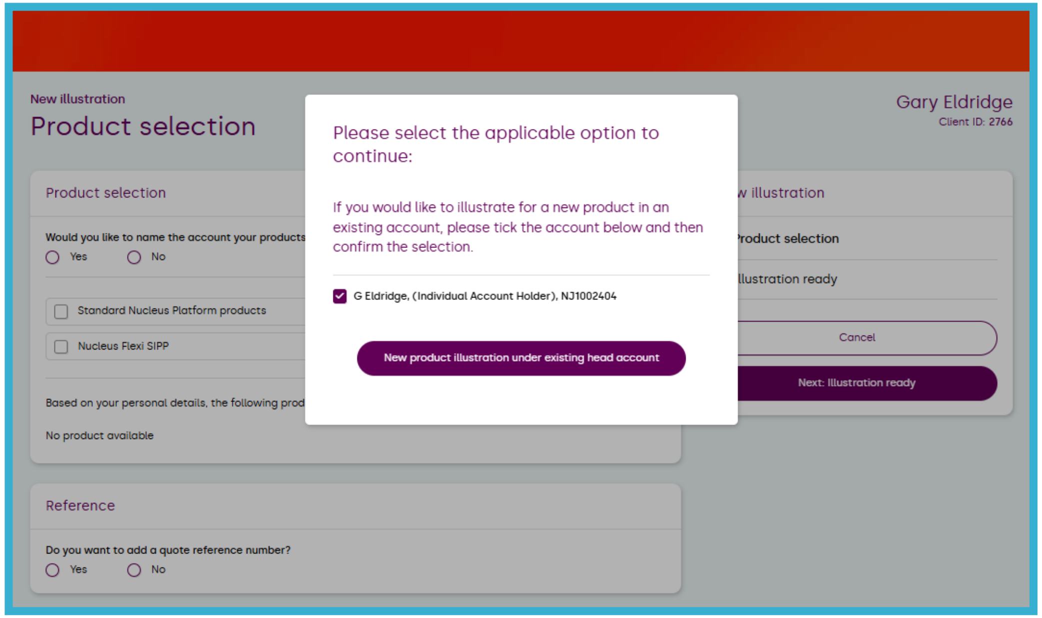


Select the **'Actions'** button in the top right of the screen.

Then select **'Illustrations'**, and **'New illustration'**.

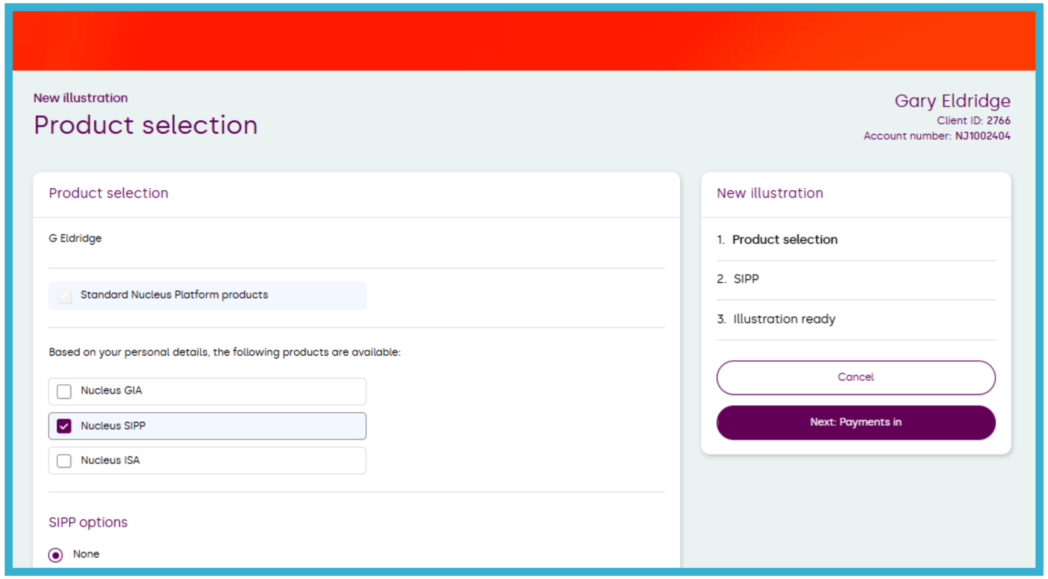


Select an existing account to create a new illustration for.



Click on the question mark icons for more information.

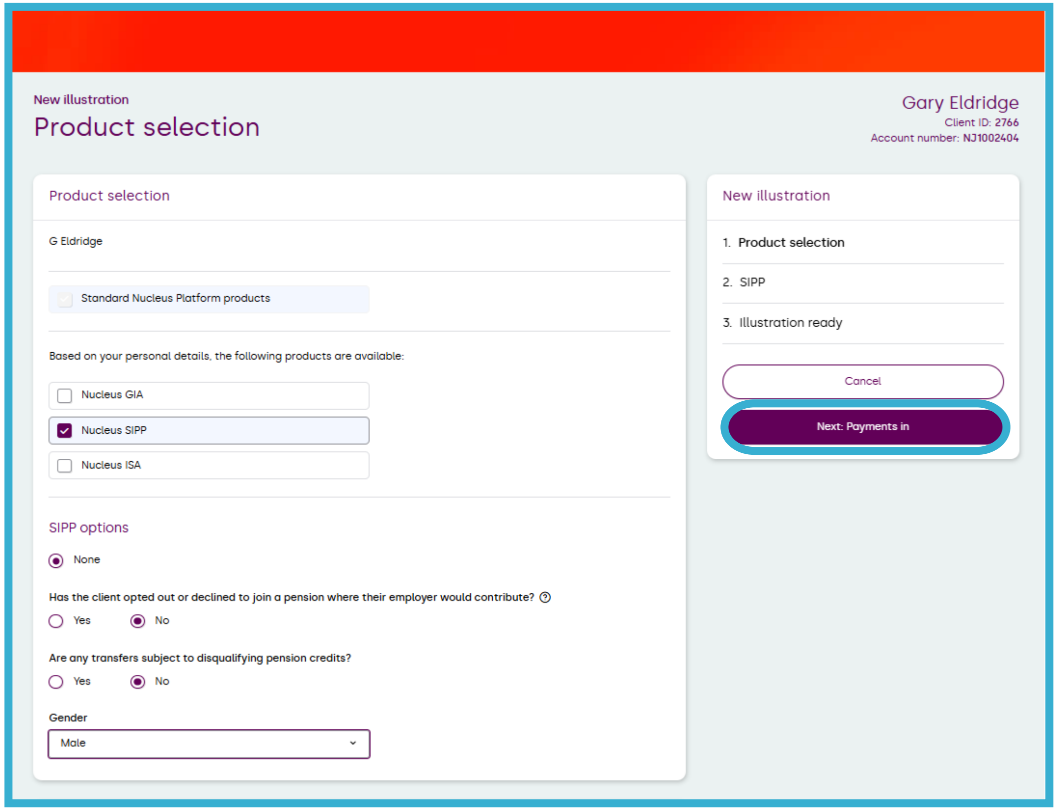
From the options available, select the product you'd like to create an illustration for.



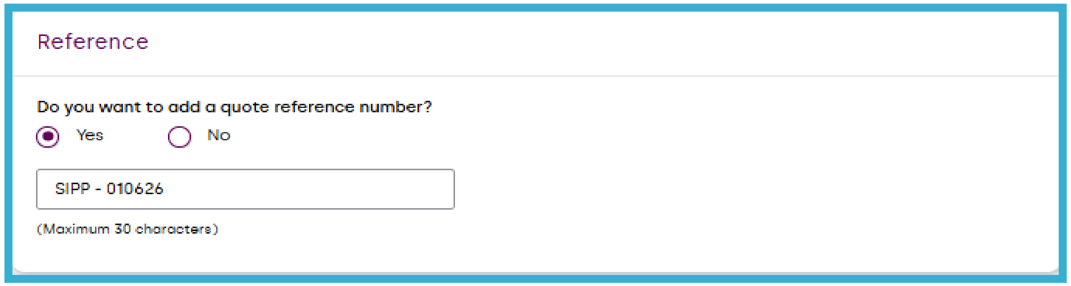
SIPP options

Under SIPP Options, You won't be able to select options like taking your pension or a tax-free lump sum here, as these need to be set up by a financial adviser.

Please speak to your adviser if you'd like help with this.



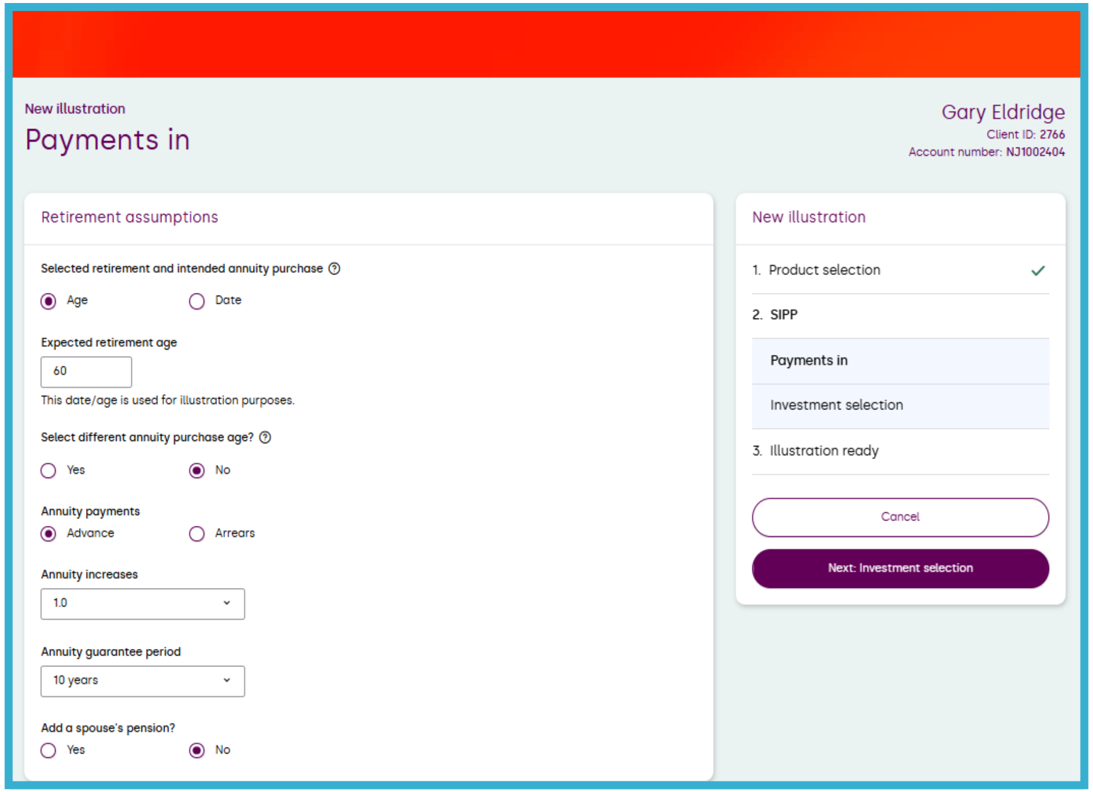
Confirm options for the next questions and then confirm your gender.



Confirm if you would like to add a quote reference to the illustration, then select **'Next: Payments in'**

Retirement assumptions

Complete the retirement assumptions,**please note, these details can be updated in the future**



Key message

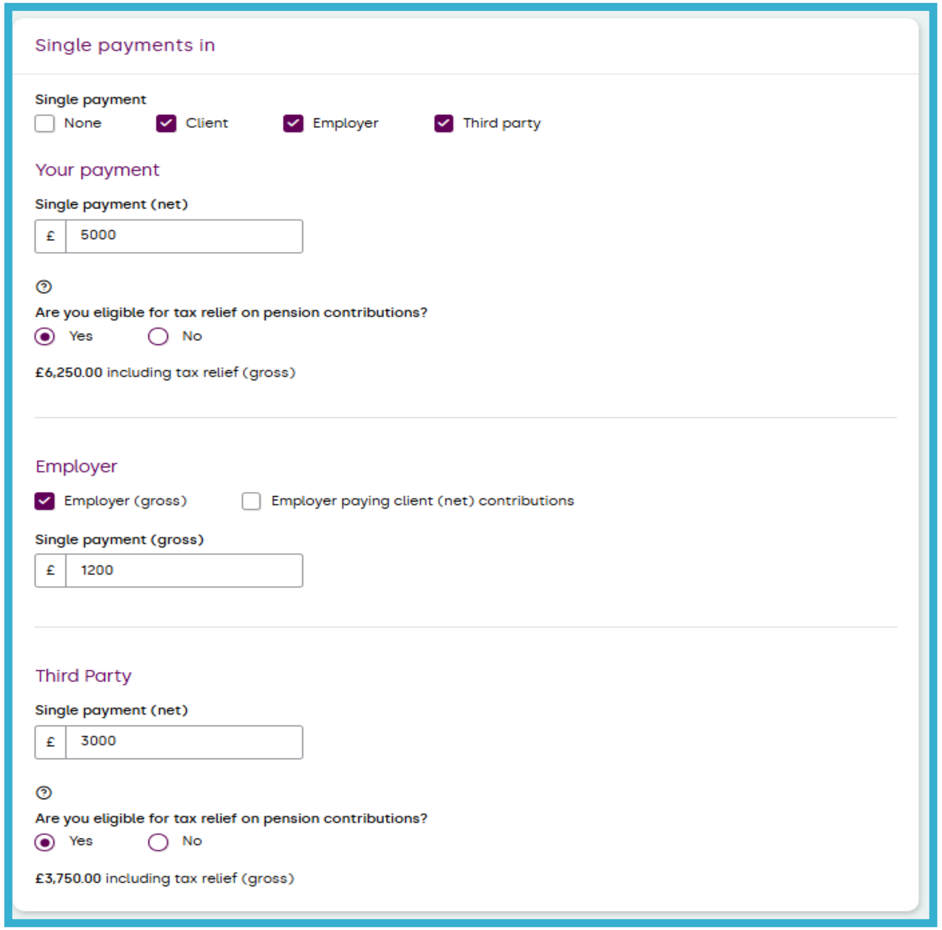
The age we'll use in illustrations for the purchase of an annuity. This can be the same or higher than the retirement age entered above, but not less.

Single payments

'Tick to select all that apply'

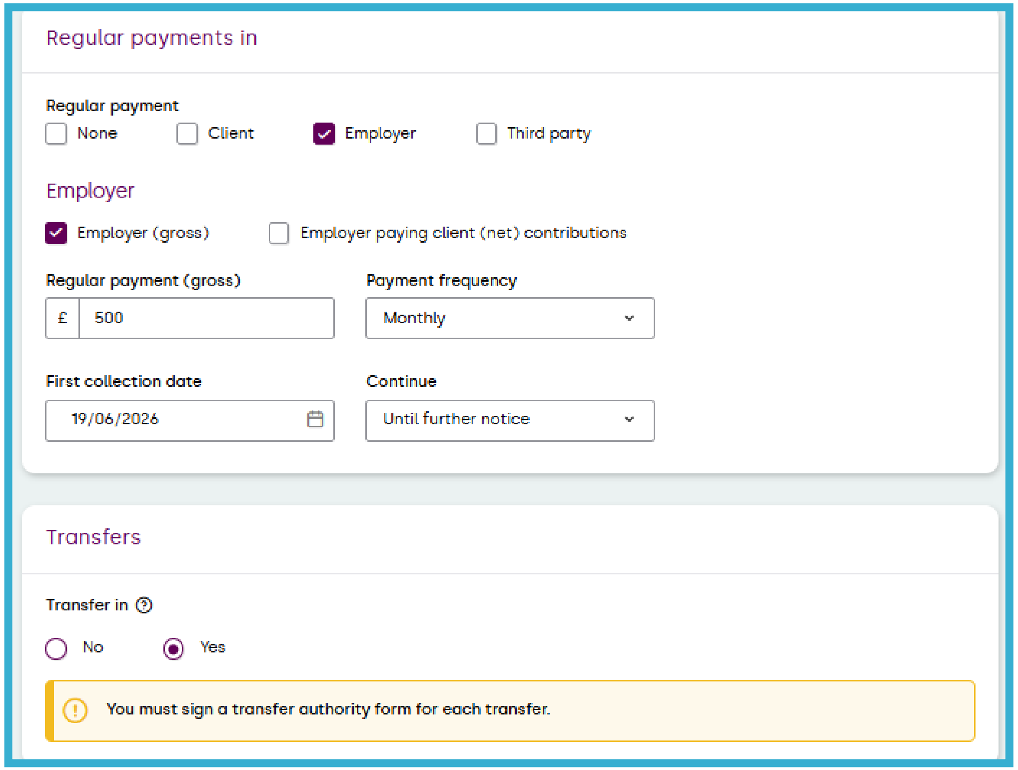
Enter your payment amount if applicable, and confirm if you're eligible for tax relief

Repeat these steps for Employer and Third party sections if required.



Regular payments in

'Tick to select all that apply' and complete the required information.



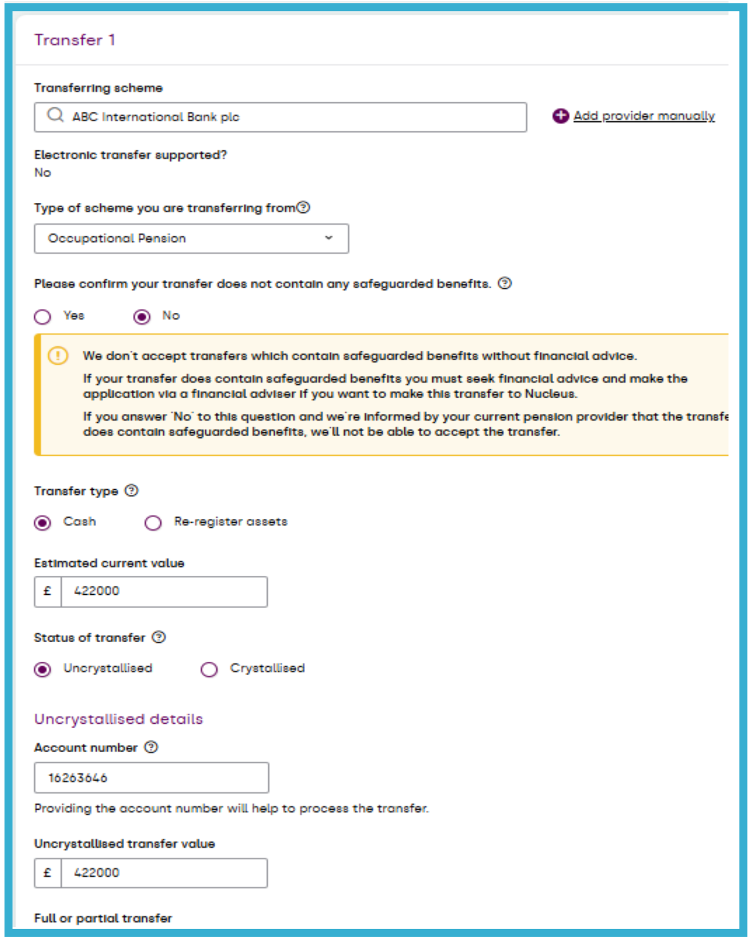
Transfer in

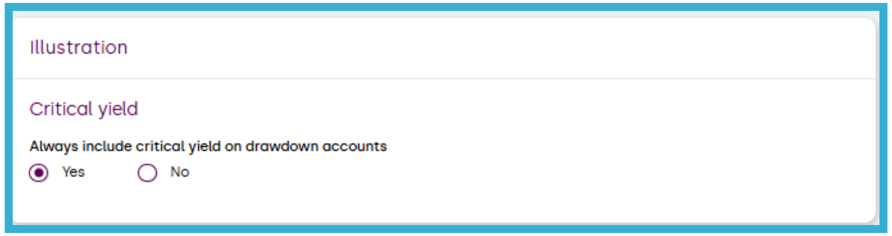
Complete all required fields

If you have another pension to transfer, select '**+ Add another transfer'**

Confirm if a critical yield calculation should be included in the instruction

Once completed, select **'Next: Investment selection'**





Investment selection

Please read the information for non-advised pension customers thoroughly and refer to our website using the link provided.

Search for the fund in the **'Investment selection'** search bar. Then specify the percentage allocation for each fund and/or cash. Ensure the total adds up to 100%.

Once you're happy with your fund selection then select **'Next: Illustration ready'**

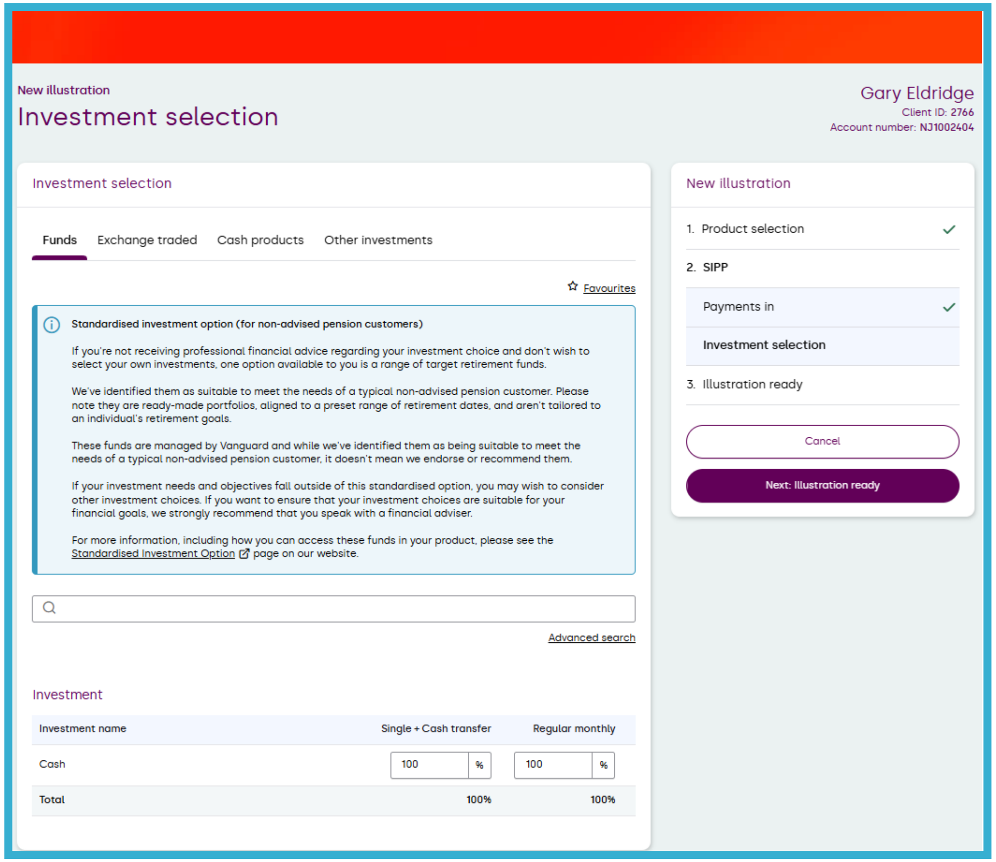
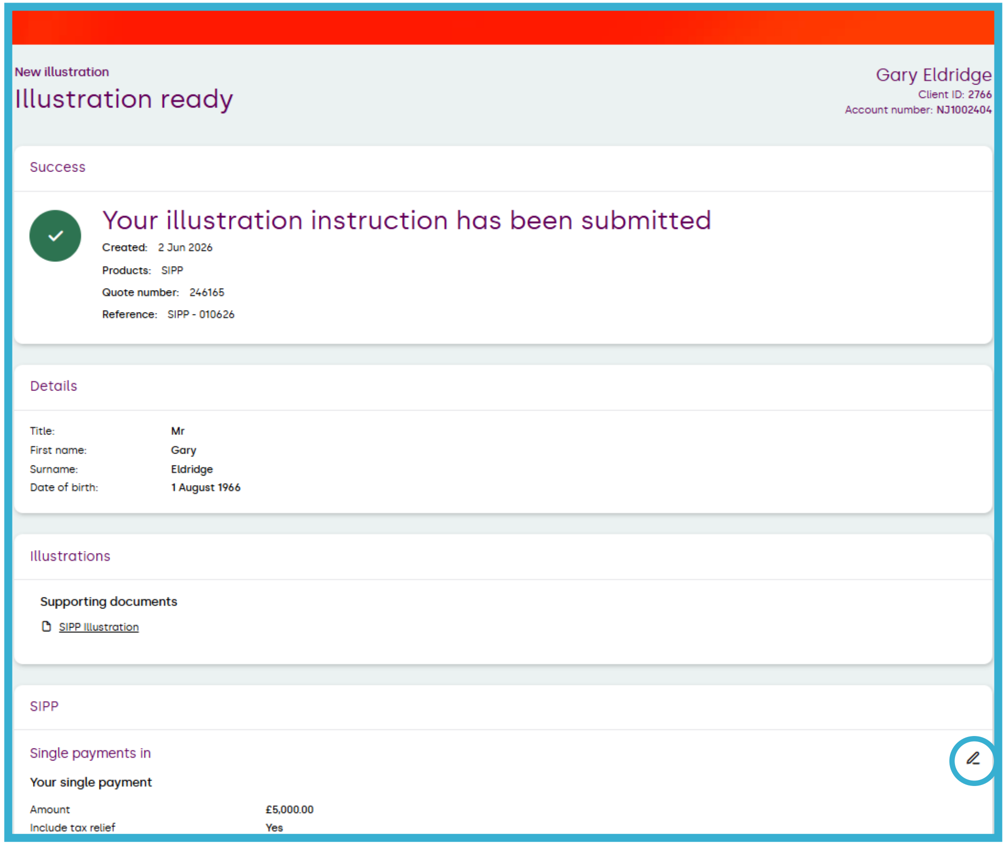


Illustration ready

The illustration has been submitted. Please review the application details for accuracy. You can use the **'pencil icon'** to make any necessary changes



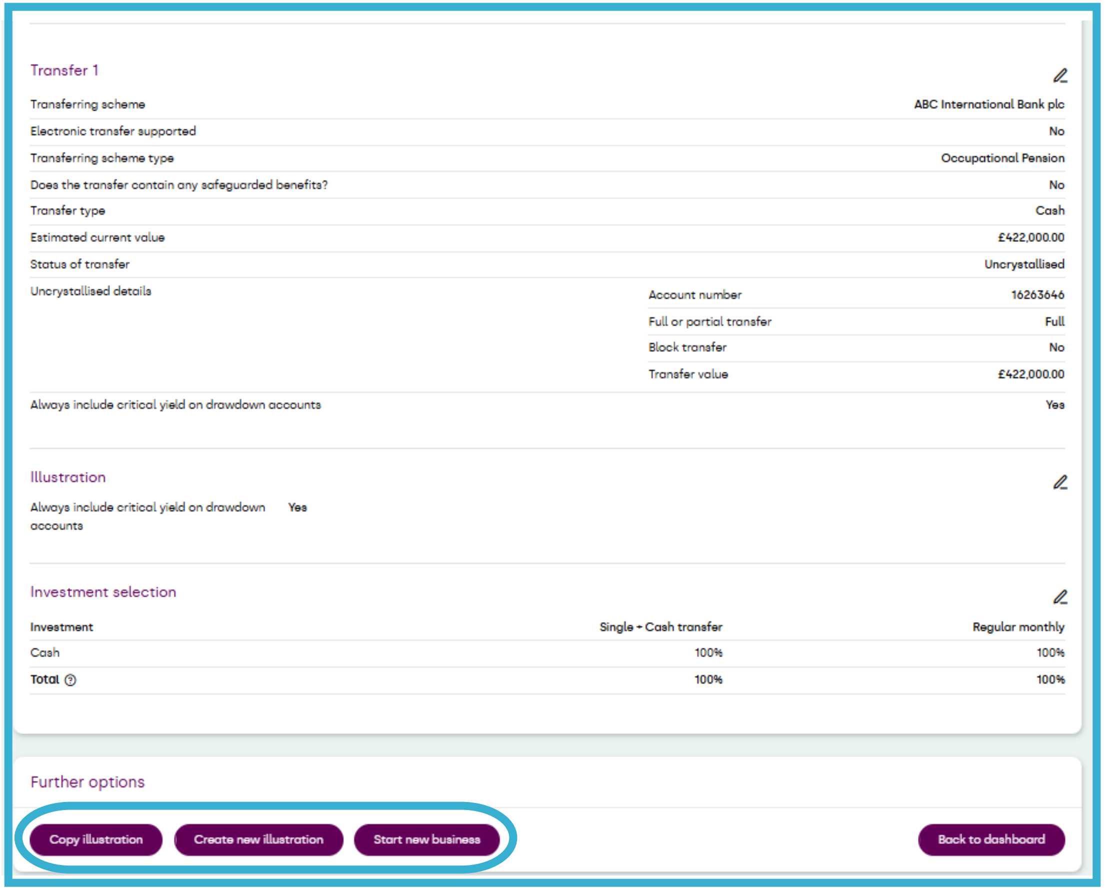
'Copy illustration' will copy the details you've entered onto another illustration. This feature could be used if you'd like to amend the investment selection, for example. This illustration will remain viewable on your documents page.

'Create new illustration' will let you create a new illustration.

'Start new business' will use the information provided on the illustration to prepopulate fields in a new business application to add a SIPP to your portfolio.

'**Back to dashboard**' will take you back to your overview page.

Your illustration can be downloaded as a PDF from the documents page.



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