Changing your bank details

Completing the form

Please ensure this form is completed accurately and in full for all the sections that are relevant to you. Missing or unclear information may delay the payment of any withdrawals.

Please note that once we've received this instruction, we will be in touch with you within two business days.

Returning the form

Please return the completed form via Jira messaging or by post to:

Nucleus,
PO Box 26968,
Glasgow,
G2 9DY

If you hold an offshore bond, we are required to send RL360 this form along with a certified copy of the associated bank statement. Please ensure this is provided to us when sending back this form.

Signing the form

We can only accept a handwritten signature.

If you forget to add a date to your signature, we'll treat the day we receive this form as the signing date.

If you have any questions please contact us by email on:

client.contact@nucleusfinancial.com

Additional Support

We recognise that personal circumstances, life altering events, or health issues could mean that you need some extra support. If there is anything we can do to help make dealing with us easier, please speak to one of our team and we'll work with you to put the right help in place. For more informaton on the types of support we can offer, visit nucleusfinancial.com/supporting-customers.

Client details

Name

Client reference number starting '100

This form is to add a new bank account to your Nucleus wrap, we won't accept this form to amend existing bank account details already held.

Any new and existing regular withdrawals/payments will now be made to this bank account, unless otherwise instructed by you. Please note that any withdrawals due in the next 15 business days will still go to the original bank details that we hold.

Please confirm the last four digits of the bank account(s) you would like us to remove from your Nucleus wrap (if required). If we do not receive confirmation, the existing bank details will remain in place.

Bank/Building Society

Sort code

Account number

Roll number

Name(s) of bank account holder(s)

(Please confirm the full name(s), avoiding use of initials)

Please confirm the full name of the account holder registered at the bank or building society. If its a joint account, please note the full name of both account holders, e.g. Mr Joseph Bloggs and Mrs Jane Bloggs.

Authorisation

Client/First trustee signature (handwritten only)

Print name

Date (dd-mm-yyyy)

– –

Joint holder/Second trustee signature (handwritten only)

Print name

Date (dd-mm-yyyy)

– –

Authorisation (continued)

Third trustee signature (handwritten only)

Print name

Date (dd-mm-yyyy)

– –

Fourth trustee signature (handwritten only)

Print name

Date (dd-mm-yyyy)

– –

Individuals and corporates

Please make sure that you are the bank account holder/joint account holder as we are unable to make payments to third parties, even with your permission.

For trust clients only

We acknowledge that this is an account belonging to the trustee/beneficiary/the solicitor/the settlor (delete as applicable) and confirm that at present we do not have a trust account set up.

We accept that there may be implications of trust monies being paid to a non-trust bank account and accept full responsibility for the tax consequences of this. We acknowledge that payment to a third party is a deviation from the Nucleus terms and conditions.

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0131 226 9535, or via the Relay UK service on 18001 0131 226 9535.

0131 226 9535 client.relations@nucleusfinancial.com www.nucleusfinancial.com

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