

Ad-hoc fees – ongoing authority

Nucleus client relations, PO BOX 26968, Glasgow G2 9DY.

Please complete and sign this form before sending to us at the above address or via Jira messaging.

If anyone forgets to add a date to their signature, we'll treat the day we receive this form as the signing date. If you've any questions please contact your client relations manager who'll be delighted to help

Adviser name

Declaration – to be signed by the client

I/We confirm that the adviser named above is my/our duly authorised representative.

Adviser firm

I/We authorise Nucleus to pay my/our adviser firm named above any ad-hoc fees as requested by them via the Nucleus platform.

Client name

I/We understand that any ad-hoc fee paid will always be confirmed to me/us via letter or email for validation purposes. You should contact Nucleus or your Adviser as soon as possible if any ad hoc advice fees deducted from your Nucleus wrap account are not what you have agreed with your Adviser.

Client reference number

I/We understand that I/we can rescind this authority at any time by contacting Nucleus or logging into Nucleus Go and changing my/our preferences.

Client/First trustee signature

Print name

Date

Third trustee signature

Print name

Date

Joint holder/Second trustee signature

Print name

Date

Fourth trustee signature

Print name

Date

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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