

For customers

Our new
platform

nucleus^o
platform

How to add
a regular
payment

🕒 3 minute read



How to add a regular payment

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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 regular payment

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

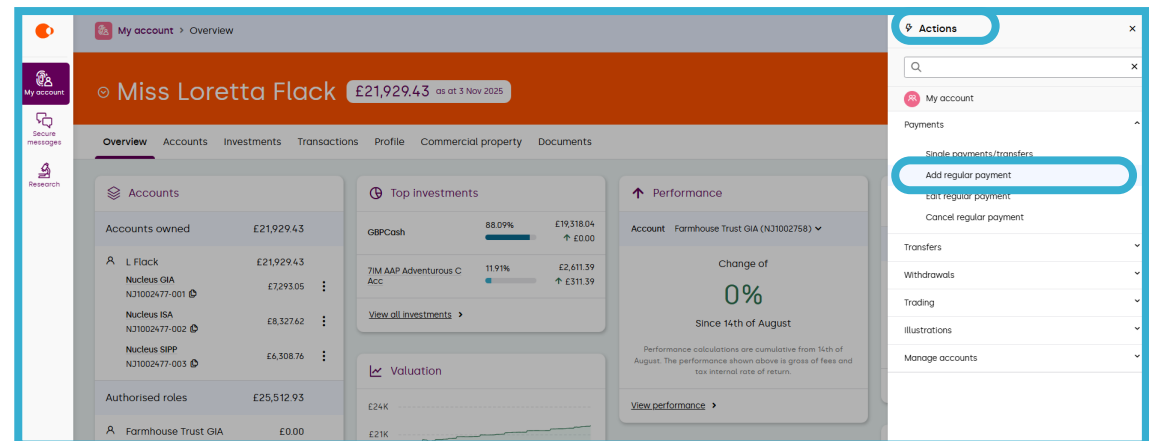
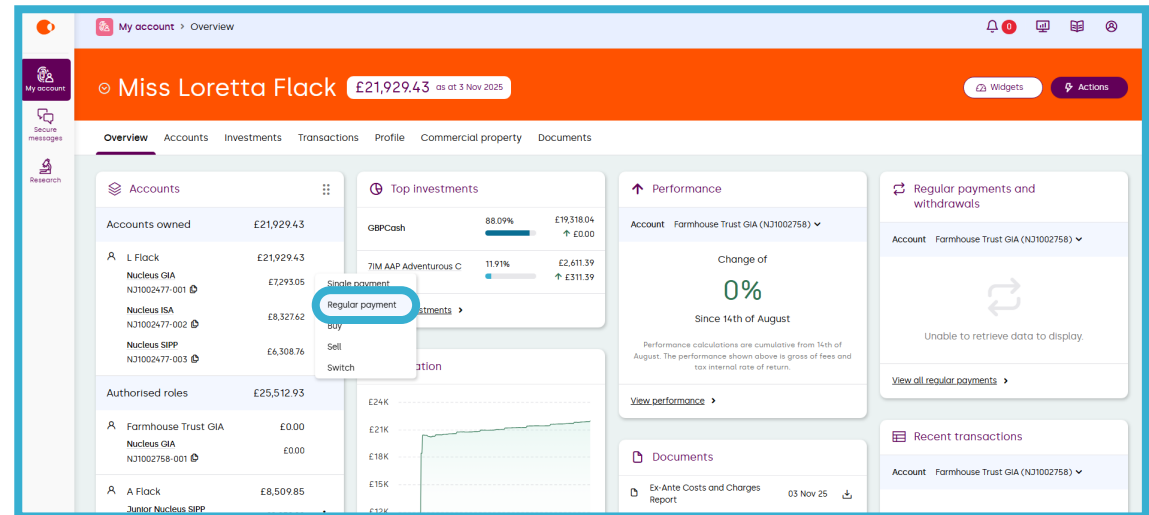
Once logged into your account, you'll arrive at your overview page.

There are two ways to access the application.

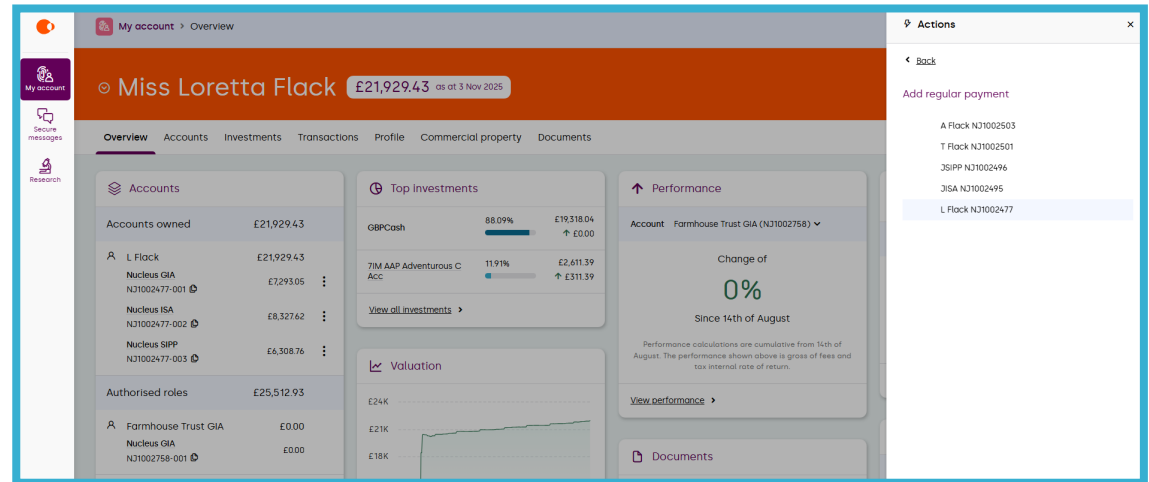
Option 1 – To add a regular payment to your investment. You can select the vertical ellipsis (three dots) next to the product in the 'Accounts' widget, then select 'Regular payment' to go directly to 'Payments in'. This route skips the account and product selection screens described below.

Option 2 – You can select the 'Actions' button in the top righthand side.

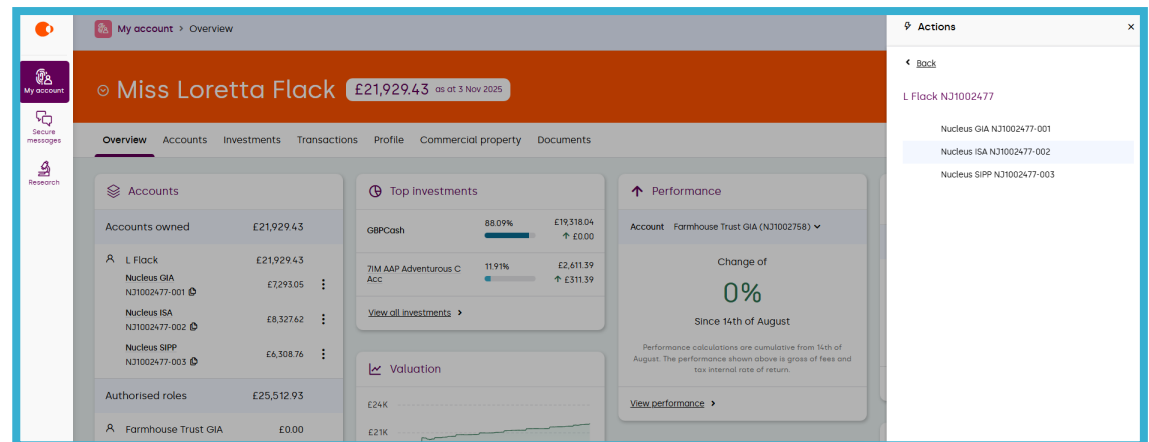
If selecting 'Actions', next select 'Add regular payment' from the dropdown menu



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



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



Payments in

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

Follow the details and add the amount into the **'Regular payment'** box. Select the payment frequency, and confirm the first collection date.

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Add regular payment

Payments in

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

Regular payments in

Regular payment

No Yes

i You can't view or add bank accounts online for third party or employer payments. Please contact us by secure message or on 03455 212 414 if action is required.

Your payment

Regular payment Payment frequency

First collection date

i The date selected is the earliest date the first payment could be collected. We'll need to receive a signed Direct Debit instruction confirming the payer's bank details before we're able to start collecting payments. If it's not possible to collect the payment on this date, the first collection date will roll forward based on the frequency selected. The first payment date will continue to roll forward at the frequency selected until all outstanding requirements are met.

Add regular payments

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

You can add an end date to the regular payments.

All regular payments are collected by Direct Debit. You'll need to download the Direct Debit mandate in this application. This can be signed digitally, or by wet signature.

[+ Add new bank account](#)

The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date, or frequency of your Direct Debit, Nucleus Financial Services Ltd will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Nucleus Financial Services Ltd to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit by Nucleus Financial Services Ltd, or your bank, or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when Nucleus Financial Services Ltd asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.
- As a Direct Debit instruction is already in place we can begin collections from this bank account without needing a further instruction from you.

I confirm that I am the account holder and the only person required to authorise debits from this account.

i The company which will appear on your bank statement in relation to these payments is Nucleus Financial Services Ltd.

If you have any questions, please contact us on 03455 212 444 or by email ask@nucleusfinancial.com.

ISA allowance

Including the value of any replaceable withdrawals, you have £20,500 allowance remaining for the 2025/2026 tax year. ⓘ

Source of wealth

Source of wealth ⓘ

Savings/Investments ▾

Add regular payments

1. Payments in
2. Investment selection
3. Review
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Cancel

Continue

Tick to confirm you are the account holder.

Select the '**Source of wealth**' via the drop down list.

Then select '**Continue**' to move onto the investment selection page.

The screenshot shows a web form with the following sections:

- Confirmation:** A section with a heading "5. Confirmation" and two buttons: "Cancel" and "Continue".
- Information:** A section with an information icon and the text: "The company which will appear on your bank statement in relation to these payments is Nucleus Financial Services Ltd."
- ISA allowance:** A section with the heading "ISA allowance" and the text: "Including the value of any replaceable withdrawals, you have £19,750 allowance remaining for the 2025/2026 tax year." followed by a small circular icon.
- Source of wealth:** A section with the heading "Source of wealth" and a dropdown menu labeled "Source of wealth" with the selected option "Savings/investments".

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, press **'Continue'** to move onto the review page.

nucleus

Add regular payment

Investment selection

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

Investment selection

Do you want to trade in investments already held? ⓘ

Use current assets No

Funds Exchange traded Other investments

☆ Favourites

Q

Advanced search

Investment

Investment name	Allocation (%)
Cash	5 %
<input checked="" type="radio"/> ZIM AAP Adventurous C Acc	95 %
Total	100%

Add regular payments

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

Cancel

Continue

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.

The screenshot shows the 'Review' stage of adding a regular payment to a Nucleus ISA. The page is titled 'Add regular payment' and 'Review'. The user's name is Loretta Flack, Client ID: 2879, Product reference: NJ1002477-002, and Product: Nucleus ISA.

Nucleus ISA

Regular payments in

Your regular payment

Amount	£150.00
Payment frequency	Monthly
First collection date	20/11/2025
Continue until	Until further notice
Payment method	Direct Debit
Bank account	Bank name Bank Example
	Account name Miss L Flack
	Account number 12345678
	Sort code 12-34-56

Investment selection

Do you want to trade in investments already held? Yes

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

Add regular payments

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

Buttons: Save and exit, Cancel, **Continue**

Here you can download each supporting document using the respective links. Documents will also be available in the 'Documents' tab on your overview page.

The screenshot shows the 'Add regular payment' interface in the Nucleus system. The page title is 'Documents and declarations'. On the right, the client'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, titled 'Documents', contains a section for signing preferences with 'Digital signature' selected. Below this is the 'Client contact details' section, which includes fields for Name (Miss Loretta Flack), Email address (Loretta.Flack+001@nucleusfinancial.com), and Phone (+44 7588265197). There are also sections for 'Documents requiring signature' (Direct Debit Instruction, Ex-Ante Costs and Charges Disclosure, Target Market Information, Key Investor Information Document) and 'Supporting documents' (ISA Illustration). The right column, titled 'Add regular payments', shows a progress list with five steps: 1. Payments in, 2. Investment selection, 3. Review, 4. Documents and declarations, and 5. Confirmation. The fourth step is currently active. At the bottom of this column are 'Cancel' and 'Submit' buttons.

⚠ Once submitted, the documents for signing cannot be amended. If any updates are required on the documents, you'll need to re-complete the application to generate new documents or access the originals from the document library and complete with a wet signature.

Documents sent for e-signature will be valid for 60 days only. If there's no activity after 60 days these will be deleted and need to be re-submitted or signed using a wet signature.

Documents and declarations

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.

The screenshot shows a 'Declarations' form with the following content:

Declarations

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

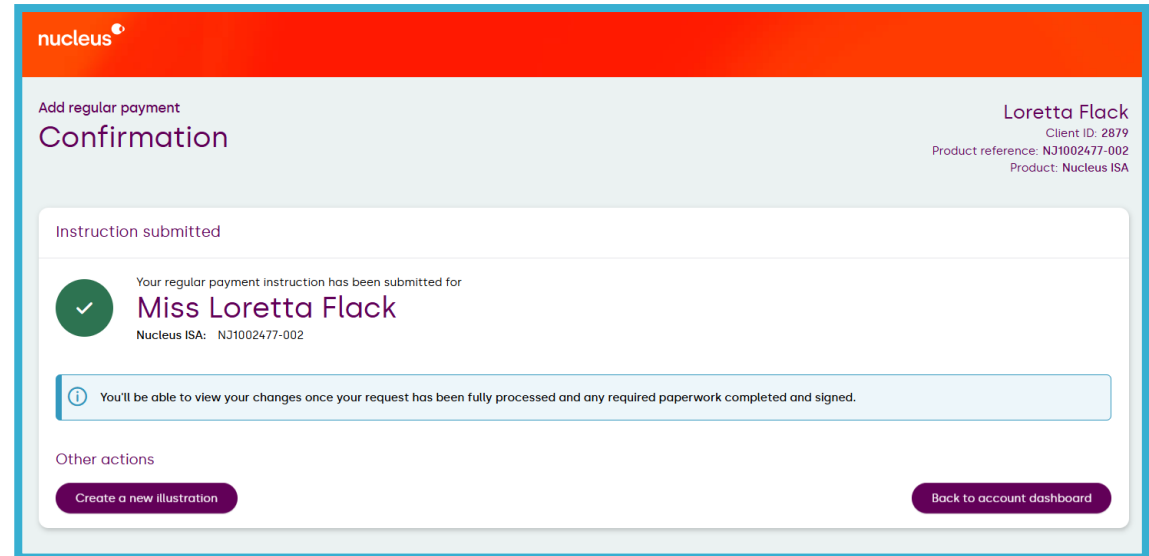
- I authorise Nucleus and its agents to deal directly with the providers and issuers of investments held and their agents in order to carry out my investment instructions.
- I understand that all trading will be carried out in line with the Instruction Transmission Policy. A copy of which can be obtained 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).


At the bottom of the form, there is a checkbox labeled 'Confirm all' which is checked. To the right of the form, there are two buttons: 'Cancel' and 'Submit'.

Confirmation


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

You'll receive an email with further instructions confirming what to do next.



 03455 212 414

 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.

"Nucleus" is the trading name for Nucleus Financial Platforms Limited (NFPL) (registered in England, number 06033126), Nucleus Group Services Limited (NGSL) (registered in England, number 02538532); James Hay Services Limited (JHS) (registered in Jersey, number 77318); James Hay Administration Company Limited (JHAC) (registered in England, number 04068398); James Hay Pension Trustees Limited (JHPT) (registered in England, number 01435887); James Hay Wrap Managers Limited (JHWM) (registered in England, number 04773695); James Hay Wrap Nominee Company Limited (JHWNC) (registered in England, number 07259308); Nucleus Financial Services Limited (NFS) (registered in England, number 05629686). NFPL, NFS, NGSL, JHAC, JHPT, JHWM, JHWNC have their registered office at Suite B & C, First Floor, Milford House, 4355 Milford Street, Salisbury, SP1 2BP. JHS has its registered office at Aztec Group House, IFC6, The Esplanade, St Helier, Jersey, JE4 0QH. JHAC, JHWM and NFS are authorised and regulated by the Financial Conduct Authority. NFPL, NGSL, NFS, JHWM, JHPT, JHAC and JHS are members of a VAT group with VAT registration number 514 0358 80. All companies are wholly owned subsidiaries of NFPL. Further details of the Nucleus Group can be found at nucleusfinancial.com. (12/25)