For advisers

Our **new** platform

nucleus platform

Death notification and beneficiary process

1. Notify us

When a client has passed, it's best to let us know as soon as you can. You can notify us of someone's death in one of two ways:

- Call our Customer Service Centre on 03455 212 414, Monday to Friday between 8:30am and 5:30pm, or secure message via your online account with us. Our team will talk you through the process and next steps.

- Write to us at Nucleus, Suite 202, Warner House, 123 Castle Street, Salisbury, SP1 3TB.

You will need to provide us with all of the information needed to identify the accounts.



For more information about how to use our secure messaging app, please see the helpsheet on our website.

2. Our part

We will confirm the accounts, cancel any regular income payments and disinvestments, check whether the client had completed an Expression of Wish form, send a Death Benefits Enquiry form to relevant parties, and let you know if there is anything else you need to provide.

For us to begin the process of arranging death benefits we will require a death certificate and a copy of the client's Will.

We may also require:

- Details of any financial dependants - Signed and written from the executors of the Will.

- Details of any other beneficiaries to consider - Signed and written from the executors of the Will

- Confirmation of the client's marital status.

- Any other documentation or information that may assist us in appointing a beneficiary.

We will continue to accept instructions from existing advisers on the plan (including trading) while the process is ongoing.

3. Options

Once everything has been provided and the accounts confirmed, we will let you know which options are available, and confirm with you how you would like to proceed.

4. Complete

We will then carry out your instructions. We aim to complete everything as quickly as we can for you, but please be aware that the time to complete may be impacted by the value of an individual's accounts and the related court documents that may be required.

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.

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