

Adviser guide

Bulk asset switches

Edition 10

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Introduction

This document provides a guide on how to instruct a bulk asset switch on the Nucleus platform.

When should you instruct a bulk asset switch?

A bulk switch should be used where you have several clients in one or more assets who all wish to switch out of one asset(s) and into another asset(s).

How do you start?

To instruct a bulk asset switch, click 'tools' at the top of the page and then select 'bulk switch' from the right hand side. You'll then see the following screen:

The screenshot shows the 'Bulk switch' interface. At the top, there is a breadcrumb trail: [Home](#) > [Tools](#) > Bulk switch. Below this, the title 'Bulk switch' is displayed. Under the title, there is a dropdown menu labeled 'Advisers' with 'All' selected. Below the dropdown, there are two search boxes. The left box is labeled 'Switch out' and the right box is labeled 'Switch in'. Both boxes have a search icon (magnifying glass) on the right. Below each search box is a placeholder text 'Search asset name or ISIN'. At the bottom right of the interface, there is a button labeled 'Find accounts'.

From this screen, select the appropriate adviser name from the 'advisers' dropdown menu. Once you've done this, select the 'switch out' panel to choose the asset you wish to switch. Enter the first three characters of the fund name or the ISIN code to take you to the fund you wish to select (this will return a maximum of 30 results, for a more specific return enter more of the fund name). Scroll down until you find your chosen fund name, as per the example below:

The screenshot shows the 'Bulk switch' interface. At the top, there's a breadcrumb trail: Home > Tools > Bulk switch. Below this, the title 'Bulk switch' is displayed. There's an 'Advisers' dropdown menu currently set to 'All'. Below the advisers menu are two search panels: 'Switch out' and 'Switch in'. The 'Switch out' panel has a search icon and a dropdown menu that is currently open, showing a list of Vanguard funds. The 'Switch in' panel also has a search icon and a text input field labeled 'Search asset name or ISIN'. A 'Find accounts' button is located to the right of the 'Switch in' panel.

Click to add your chosen fund. You can now repeat the process under the 'switch in' field to search for the fund you wish to switch in.

If you want to edit the percentage being switched, you can do so by clicking on the asset 'chip'. When clicking on this chip, you can also access the asset's fund fact sheet and KIID/PRIP's link.

The screenshot shows a dark grey header bar with the text 'AXA Framlington UK Mid Cap Z Inc (GB00B3SYV567)'. To the right of the text are two icons: a KIID icon and a close icon (X). Below the header bar is a light grey box containing the text '100 %' with a horizontal line underneath the '100'.

Once you've selected the fund, select 'find accounts' to show the list of accounts invested in the 'switch out' asset.

The screenshot shows the 'Bulk switch' interface with both 'Switch out' and 'Switch in' panels. The 'Switch out' panel has a search icon and a dropdown menu showing 'AXA Framlington UK Mid Cap ... (GB00B64W4Q70) 100.00%'. The 'Switch in' panel has a search icon and a dropdown menu showing 'Vanguard FTSE Developed W... (GB00B59G4Q73) 100.00%'. Below the dropdown menus are two text input fields labeled 'Search asset name or ISIN'. At the bottom right, there are two buttons: 'Clear' and 'Find accounts'.



Bulk switch will allow a switch to be placed while a pending transaction exists on the same asset. The rationale for allowing a switch out on top of a pending transaction is to allow you to continue to trade if a significant market movement occurs even if an account has a pending sell/buy. Therefore, it's important to note that the percentage selected on the switch out is calculated based on the amount available to switch rather than the current amount held.

Your screen will look as follows:

Home > Tools > Bulk switch

Bulk switch

Advisers

A N Other (0000)

Switch out

AXA Framlington UK Mid Cap ... (GB00B64W4Q70) 100.00%

Search asset name or ISIN

Switch in

Vanguard FTSE Developed W... (GB00B59G4Q73) 100.00%

Search asset name or ISIN

Bulk switch accounts (172) (0)

Account number

Account holder

Adviser

A N Other - 0000

Account type

All

Model portfolio

Included and/or excluded

All

Clear

Find accounts

172 results (page 1 of 7)

1

2

3

4

5

6

7

25

Include	Adviser	Account holder	Account type	Account no	Model portfolio	Details
☐	A N Other - 0000		Isa	NXXXXXX	Model Portfolio 1	
☐	A N Other - 0000		Pension	NXXXXXX	Model Portfolio 3	
☐	A N Other - 0000		Pension	NXXXXXX	Model Portfolio 1	
☐	A N Other - 0000		Pension	NXXXXXX	Model Portfolio 2	
☐	A N Other - 0000		Pension (former PR)	NXXXXXX	Model Portfolio 2	

By scrolling down to the bottom of the page, you may notice an orange progress bar at the bottom of the screen. At this point, validation is taking place against each account returned to make sure that it's eligible to be part of the switch.

Preparing bulk switch data, you can proceed when complete

If there's any reason why an account with a holding in the asset being switched out can't be included e.g. trade will fail to meet a fund minimum, it will be greyed out and won't be available for inclusion.

The tool can also be used to switch out of multiple assets and/or cash into multiple assets or one single asset and/or cash, or out of one single asset and/or cash into multiple assets and/or cash. Please see the examples below for reference:

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Multiple assets into a single asset

Home > Tools > Bulk switch

Bulk switch

Advisers
A N Other - 0000

Switch out

Cash 100.00%

AXA Framlington UK Mid Cap ... (GB00B64W4Q70) 50.00%

Aberdeen Global High Yield B... (GB00B019HK48) 20.00%

Search asset name or ISIN

Switch in

Vanguard FTSE Developed W... (GB00B59G4Q73) 100.00%

Search asset name or ISIN

Clear Find accounts

Multiple assets into cash (switching only partial amounts out of certain funds)

Home > Tools > Bulk switch

Bulk switch

Advisers
A N Other - 0000

Switch out

AXA Framlington UK Mid Cap ... (GB00B64W4Q70) 100.00%

Search asset name or ISIN

Switch in

Cash 20.00%

Vanguard FTSE Developed W... (GB00B59G4Q73) 50.00%

Aberdeen Global High Yield B... (GB00B019HK48) 30.00%

Search asset name or ISIN

Clear Find accounts

From here, all accounts with a holding in the switch out asset(s) will be displayed. By default, all accounts are excluded from this switch and can be included by selecting the 'include' check box on the left-hand side.

Home > Tools > Bulk switch

Bulk switch

Advisers
A N Other (0000)

Switch out

AXA Framlington UK Mid Cap ... (GB00B64W4Q70) 100.00%

Search asset name or ISIN

Switch in

Vanguard FTSE Developed W... (GB00B59G4Q73) 100.00%

Search asset name or ISIN

Clear Find accounts

Bulk switch accounts (172) (1)

Account number	Account holder	Adviser A N Other (0000)
Account type All	Model portfolio	Included and/or excluded All

172 results (page 1 of 7) 1 2 3 4 5 6 7 25

Include	Adviser	Account holder	Account type	Account no	Model portfolio	Details
☒	A N Other - 0000	Au, Ricky	Isa	NXXXXXX	Model Portfolio 1	

If you'd like to include all accounts in the switch, you can do so by clicking the 'include' column header, then selecting 'all' from the dropdown. Please note, this will apply the 'all' setting to all accounts displayed. If you've applied any filters, the 'all' setting will apply to all accounts from that filter.

Home > Tools > Bulk switch

Bulk switch

Advisers

A N Other (0000)

Switch out

AXA Framlington UK Mid Cap ... (GB00B64W4Q70) 100.00%

Search asset name or ISIN

Switch in

Vanguard FTSE Developed W... (GB00B59G4Q73) 100.00%

Search asset name or ISIN

Bulk switch accounts (172) (1)

ClearFind accounts

Account number

Account holder

Adviser

A N Other (0000)

Account type

All

Model portfolio

Included and/or excluded

All

172 results (page 1 of 7) 1 2 3 4 5 6 7 25

Include	Adviser	Account holder	Account type	Account no	Model portfolio	Details
All	A N Other - 0000	Au, Ricky	Isa	NXXXXXX	Model Portfolio 1	
None	A N Other - 0000	1	Pension	NXXXXXX	Model Portfolio 3	
	A N Other - 0000		Pension	NXXXXXX	Model Portfolio 1	

To view the switch details of the account, please click on the dropdown arrow by clicking on the 'details' column:

Home > Tools > Bulk switch

Bulk switch

Advisers

A N Other (0000)

Switch out

AXA Framlington UK Mid Cap ... (GB00B64W4Q70) 100.00%

Search asset name or ISIN

Switch in

Vanguard FTSE Developed W... (GB00B59G4Q73) 100.00%

Search asset name or ISIN

Bulk switch accounts (172) (1)

ClearFind accounts

Account number

Account holder

Adviser

A N Other (0000)

Account type

All

Model portfolio

Included and/or excluded

All

172 results (page 1 of 7) 1 2 3 4 5 6 7 25

Include	Adviser	Account holder	Account type	Account no	Model portfolio	Details
☒	A N Other - 0000	Au, Ricky	Isa	NXXXXXX	Model Portfolio 1	
		Asset	Units	Latest price	Estimated value	
Switch out:	AXA Framlington UK Mid Cap Z Acc (GB00B64W4Q70)		89.631000	£1.652000	£148.07	
Switch in:	Vanguard FTSE Developed World xUK Equity Index Acc (GB00B59G4Q73)		0.391000	£378.708300	£148.07	

The search functionality allows you to search using the first three characters on the following fields:

- Account number
- Account holder
- Model portfolio
- Adviser

The following example shows a search by selecting 'account holder'.

Home > Tools > Bulk switch

Bulk switch

Advisers
A N Other (0000)

Switch out
AXA Framlington UK Mid Cap ... (GB00B64W4Q70) 100.00%
Search asset name or ISIN

Switch in
Vanguard FTSE Developed W... (GB00B59G4Q73) 100.00%
Search asset name or ISIN

Bulk switch accounts (172) (1) Clear Find accounts

Account number

Account holder
dol

Adviser
A N Other - 0000

Account type
All

Included and/or excluded
All

[Clear all filters](#)

2 results (page 1 of 1) 1 25

Include	Adviser	Account holder	Account type	Account no	Model portfolio	Details
☐	A N Other - 0000	Pension (former PR)	NXXXXXX		Model Portfolio 3	
☐	A N Other - 0000	Pension	NXXXXXX		Model Portfolio 2	

In addition to the fields stated above, you can carry out a search by 'account type', as per the example below. You can also keep track of all accounts being included/excluded by clicking on the 'Included and/or excluded' filter.

Home > Tools > Bulk switch

Bulk switch

Advisers
Ivan Rogge (1002)

Switch out
AXA Framlington UK Mid Cap ... (GB00B64W4Q70) 100.00%
Search asset name or ISIN

Switch in
Vanguard FTSE Developed W... (GB00B59G4Q73) 100.00%
Search asset name or ISIN

Bulk switch accounts (172) (2) Clear Find accounts

Account number

Account holder

Adviser
A N Other - 0000

Account type
All

Model portfolio

Included and/or excluded
All

Account type ×

☒ All	☒ Isa	☒ Pension	☒ Pension (former PR)
☒ General	☒ Drawdown	☒ Drawdown (former PR)	
☒ Unsecured APP	☒ Onshore Bond (Sanlam)		

172 results (page 1 of 7) 1 2 3 4 5 6 7 25

Bulk asset switches

Once you’re happy with your selection, click next.

If you’re switching from an asset that’s within a model portfolio, this will not change the assets held within the model portfolio. If you wish to change the assets for future investments and rebalancing, please do so via the model portfolio self-service tool.

Pre-submission page

This page shows confirmation of the assets being switched out and switched in. You can view the accounts you’ve included in the switch as well as the accounts excluded or unavailable.

[Home](#) > [Tools](#) > Bulk switch

Bulk switch summary

Switch out

AXA Framlington UK Mid Cap Z Acc (GB00B64W4Q70)100%

Switch in

Vanguard FTSE Developed World xUK Equity Index Acc (GB00B59G4Q73)100%

Accounts included in switch (3)Accounts excluded from switch (169)Accounts unavailable for switch (0)

3 results (page 1 of 1)125

Adviser	Account holder	Account type	Account no	Model portfolio
A N Other - 0000	Au, Ricky	Isa	NXXXXXX	Model Portfolio 3
A N Other - 0000		Pension (former PR)	NXXXXXX	Model Portfolio 1
A N Other - 0000		Pension	NXXXXXX	Model Portfolio 1

3 results (page 1 of 1)125

BackDownload PDFSubmit

At this point you can download the pdf. Once you’re happy, click submit.

[Home](#) > [Tools](#) > Bulk switch

Bulk switch summary

Bulk switch successfully submitted.

Switch out

✓ AXA Framlington UK Mid Cap Z Acc (GB00B64W4Q70)100%

Switch in

✓ Vanguard FTSE Developed World xUK Equity Index Acc (GB00B59G4Q73)100%

Download PDFNew bulk switch

Further support

We hope this guide has helped you understand how to instruct a bulk switch on the Nucleus platform. If you need further help please contact the client relations team on 0131 226 9535 or through our ‘Live chat’ feature on the top right of the platform home page.

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.



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