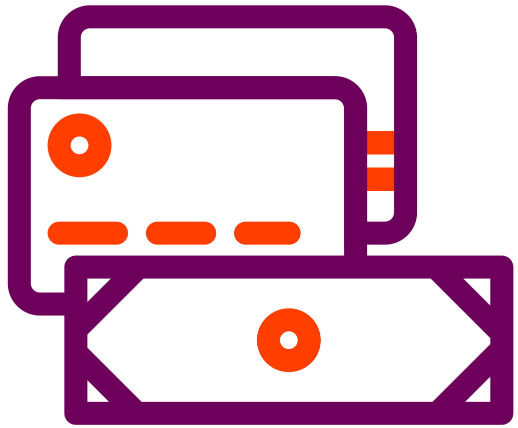
For advisers

Our new platform

nucleus platform

How to process a GIA single withdrawal



2 minute read

How to process a GIA single withdrawal

How to use this document

Important information will look like this.

Key messages

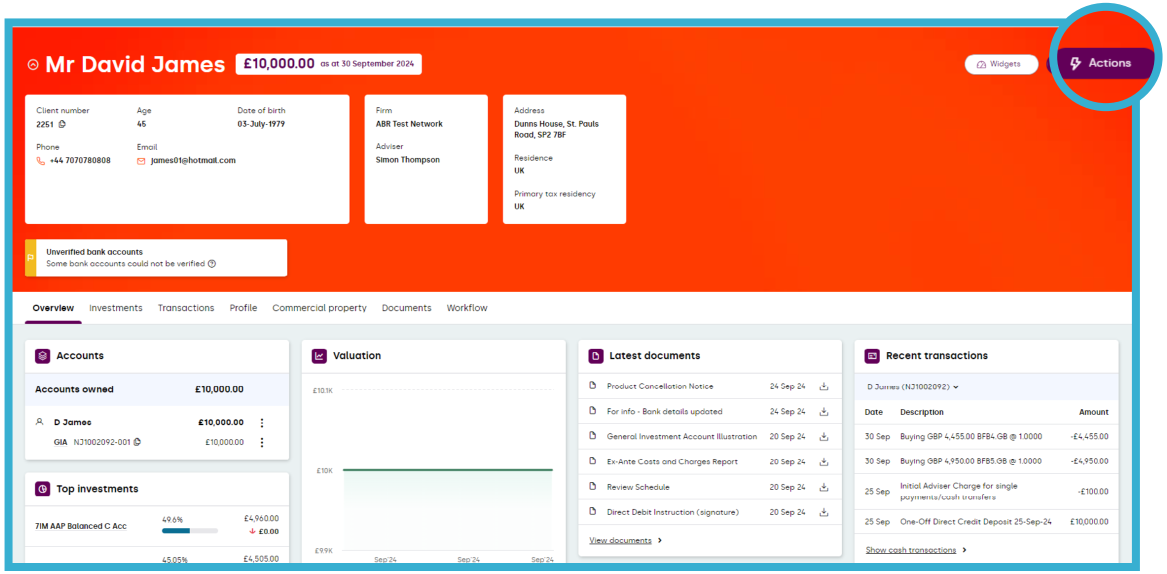
Key messages will look like this.

Useful info will look like this.

We recommend using the zoom function to view the details on the platform screens in this guide.

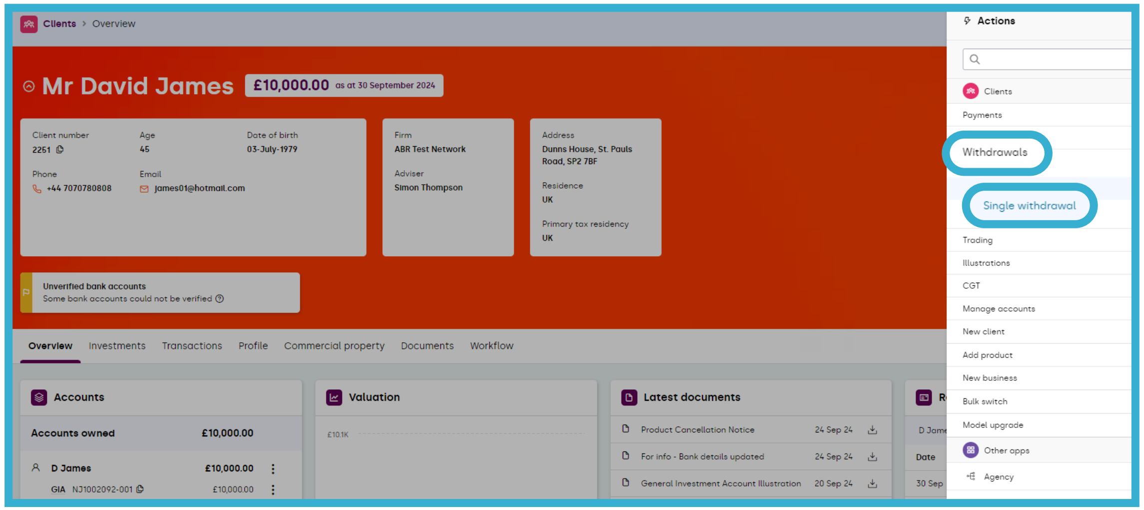
How to process a GIA single withdrawal

To start the GIA single withdrawal process, you first need to find your client. Please refer to the guides on our website to search for a client or create a new client.



From the client landing page select the **'Actions'** button.

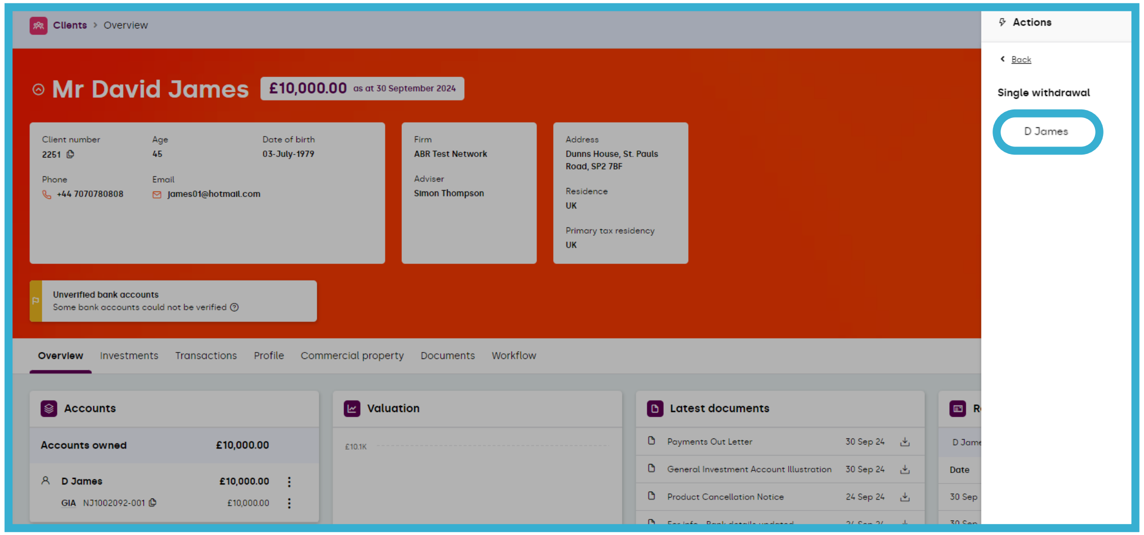
A list of actions will appear. To create the withdrawal process, select **'Withdrawals'** and then **'Single withdrawal'**.

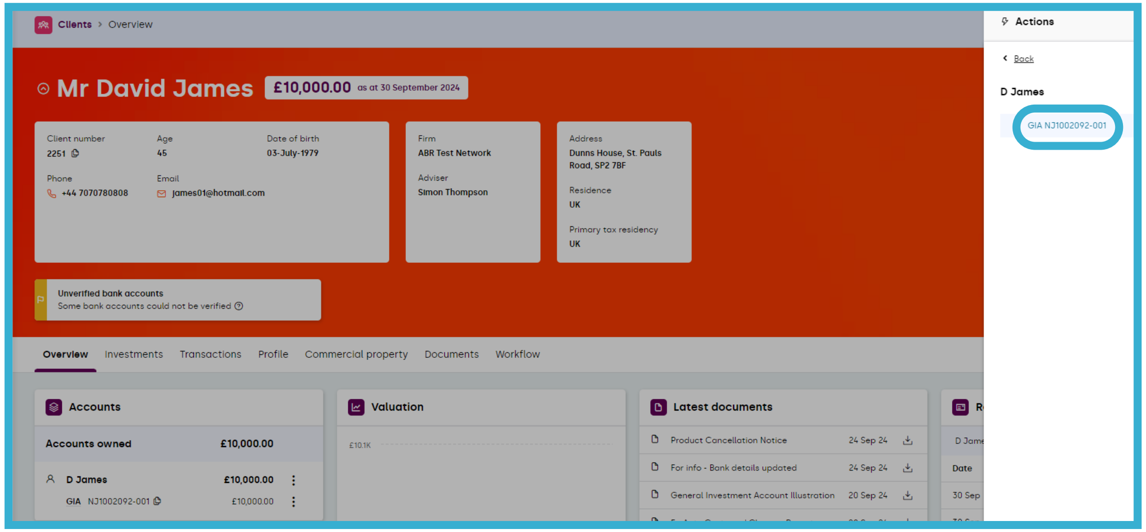


Select the account you wish to set up a single withdrawal for.

At least one bank account that's nominated for withdrawals is required to complete the transaction.

Any regular withdrawals from this account will be made as per the instructions given, these will be paid separately.





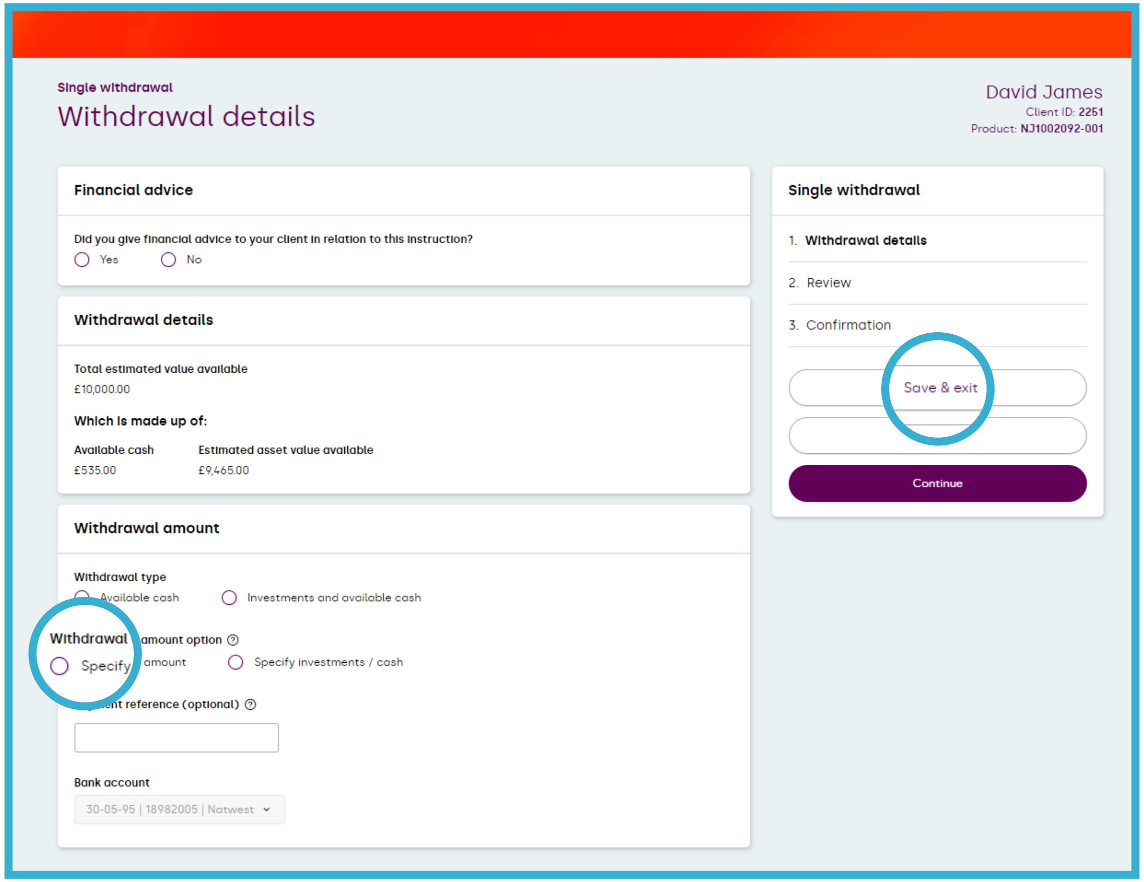
Withdrawal details

At any stage of the process, you can **'Save and exit'** the application. To resume the session, navigate to the workflow tab within the client's account.

Confirm if financial advice has been provided to the client.

Confirm all withdrawal amount details.

If you select **'specify amount'**, you can tell us how much you want to withdraw and then select the cash and investments below, that you wish to be used to make this withdrawal. If you select specify investments / cash, you can tell us which investments / cash you want to sell. The amount of the withdrawal will then be the total value of the investments / cash you select.



Confirm if you would like to add a reference to be used when making the payment

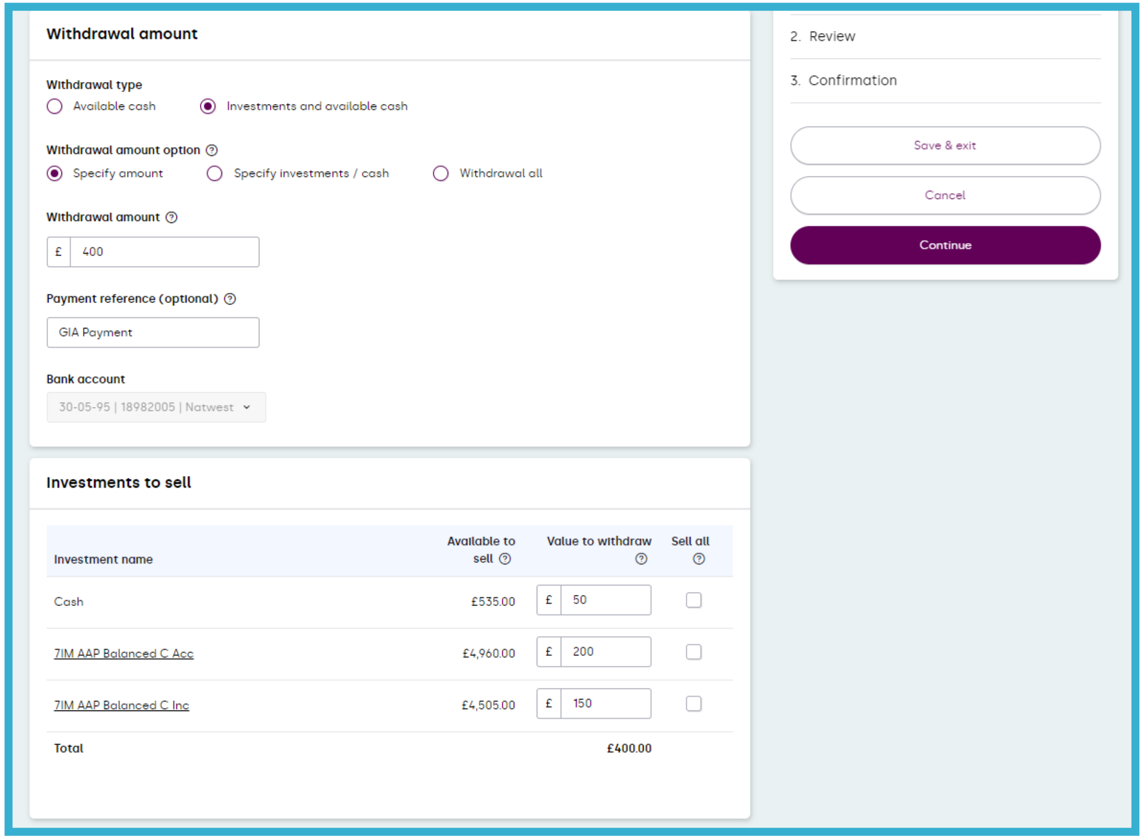
Key message

You can add a reference which will be used when we make the payment. Adding a reference will make it easy for your client to identify the payment in their bank account and on their bank statements.

If you're using a Building Society, please enter the roll number here. Any reference entered will be displayed on bank statements against the payment received.

Select the nominated bank account.

The bank account will be pre-populated if your client only has one authorised nominated bank account. If you'd like to add a new bank account, please go to the Bank Account page. Once the bank account added has been validated, you can then select this new bank account for regular payments out.



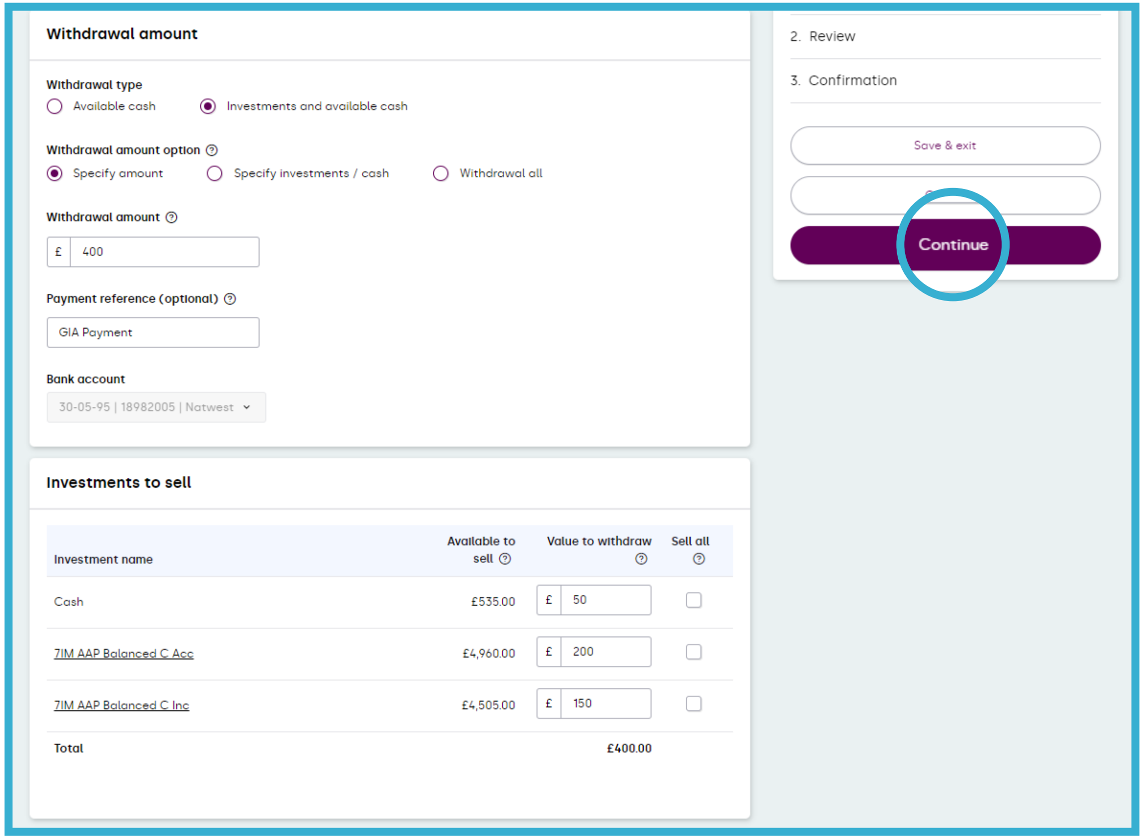
Confirm investments to sell and the withdrawal amounts.

Selecting withdraw all will trigger an account closure. If your client doesn't wish to close the account, select **Specify amount** or **Specify investments / cash**.

Where investments are sold in a GIA to make withdrawals, they will be a disposal for Capital Gains Tax (CGT) purposes.

This means there may be tax to pay through the HMRC self-assessment process.

Once you're happy with all your withdrawal details, select **'Continue'** to move on to the review page.

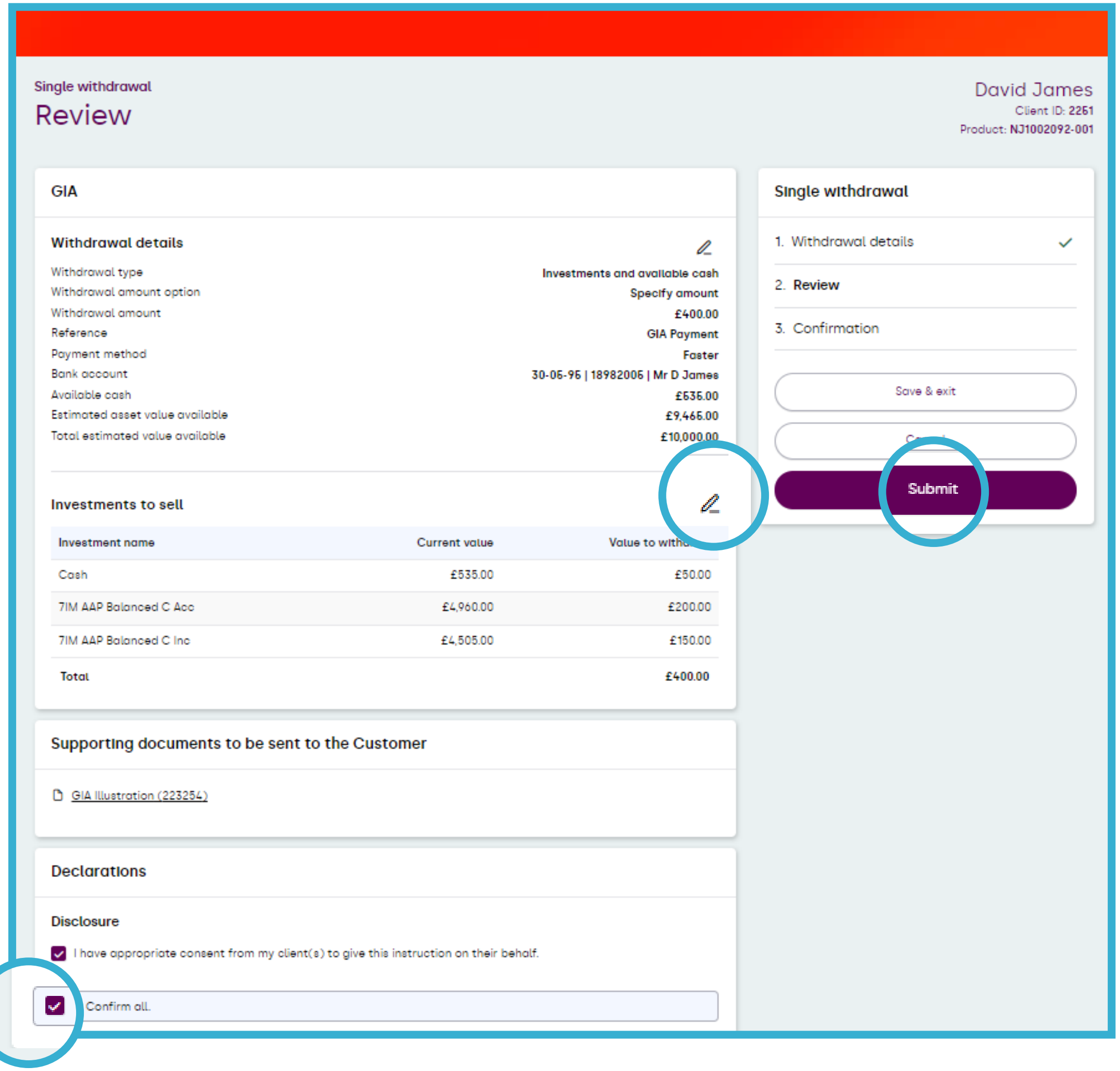


Review

Review the withdrawal details for accuracy. You can make any changes using the **'pencil'** icons.

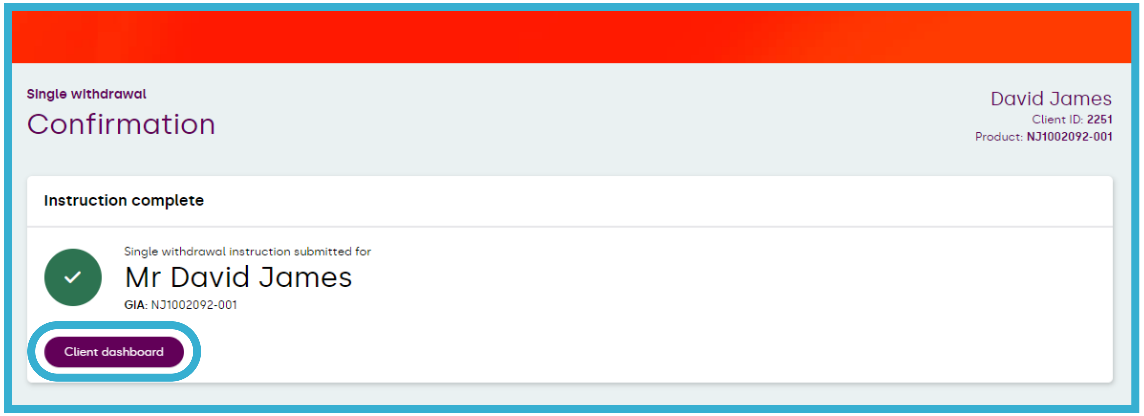
Read the declaration and tick to confirm completion.

Select **'Submit'** to submit the single withdrawal.



The withdrawal has been submitted.

You can select **'Client dashboard'** to the client's homepage.



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