



nucleus^o platform

Legal guardian declaration form

Please complete this form in BLOCK CAPITALS and return it by:

- **post** to Nucleus, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB, or
- **secure message** via your online account with us.

If you need any help, please call your Customer Support Team or our general enquiry number 03455 212 414.

Using this form

Please complete this form if you are to act as the legal guardian to a customer of a Nucleus product who is under the age of 18 years at the date of the application.

Data protection

You can access full details on what to expect when we process personal data in our Privacy Notice, which is available on our website nucleusfinancial.com/privacy-notice or on request.

Section 1 - Applicant's (customer) details

Product name

Product number

Applicant's name

Applicant's date of birth (DD/MM/YYYY)

Applicant's nationality

If applicant is British, please provide National Insurance number

Section 1b - Legal guardian's details

Legal guardian's title

Legal guardian's first name

Legal guardian's surname

Legal guardian's address

Postcode

Email address

Telephone number

Legal guardian's date of birth (DD/MM/YYYY)

Legal guardian's relationship to the applicant

Legal guardian's nationality

Section 2 - Consent of the current legal guardian (if applicable)

If we currently hold a record of a legal guardian who is to be replaced by the individual named in Section 1b, please confirm their consent below:

I am the current legal guardian and I give my consent for the person named in Section 1b to become the new legal guardian.

Current legal guardian's signature

Current legal guardian's name

Date (DD/MM/YYYY)

If a current legal guardian is being replaced but their consent can't be obtained or isn't needed, please explain why

Section 3 - Legal guardian's declaration

I confirm that I am the legal guardian of the applicant named above.

I agree to remain responsible for, and act on behalf of, the applicant in all matters relating to the product until the named applicant reaches 18 years of age.

I confirm that I am over 18 years of age at the date of signature.

I understand that the money paid in to the product may only be returned to the applicant in accordance with the rules of the product.

I agree to notify Nucleus when the applicant reaches their 18th birthday.

Legal guardian signature

Legal guardian name

Date (DD/MM/YYYY)

Checklist of identity documentation required

When you apply for a Nucleus product or administer on someone else's behalf, we need to verify your identity. If you have an adviser, they can do this for you. Alternatively, you can supply us with appropriate documentation from the lists below.

Please send photocopies of the documentation to Nucleus, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB.

1. Evidence of identity for the legal guardian

Black and white photocopies of two documents - one from list A and one from list B. (Items from the same source cannot be used twice).

List A

- Unexpired passport
- Unexpired UK old style driving licence (not provisional)
- Unexpired UK photocard driving licence
- Firearms certificate or shotgun licence
- EEA or Switzerland national identity card
- Northern Ireland voters card.

List B

- Unexpired UK old style driving licence (not provisional)
- Unexpired UK photocard driving licence
- Council tax bill dated within the last 12 months
- Firearms certificate or shotgun licence
- Credit card or bank statement dated within the last three months (not internet printed)
- Utility bill dated within the last three months (not mobile phone, satellite/cable TV or internet printed bills)
- HMRC coding/ assessment/statement/tax credit
- Northern Ireland voters card.


2. Evidence of age for the Nucleus customer


- Black and white photocopy of unexpired passport, or
- Original birth certificate (and original marriage certificate if the legal guardian's name has changed on marriage) Crown Copyright rules mean that we can only accept original certificates, or
- An original letter from your adviser.

3. Evidence of the relationship between the legal guardian and the Nucleus customer

If you are the parent of the applicant and are named on their birth certificate, this is acceptable evidence.

Otherwise, a certified copy of the document that appoints you as their legal guardian is required, such as a court order, or a will naming you guardian along with the grant of probate and evidence that there is no other surviving person with parental responsibility.

 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 Relay UK service on 18001 03455 212 414.

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