For customers

For full functionality, please download and complete this form as a PDF.

Our new platform

nucleus platform

Appointment of financial adviser 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

This form should be completed if you wish to appoint or change your Financial Conduct Authority (FCA) regulated financial adviser (adviser). Your appointed adviser will to be able to view and manage your Nucleus product(s) on your behalf.

Please note that your chosen adviser will need to have agreed to our Adviser Terms of Business.

Section 1 - Personal details

Full name

Product number(s)

Please list all product numbers to which this authority should apply.

Please note that your adviser will still have read-only access to all of your products through their online portal account, even for products where they are not appointed.

Section 2 - Adviser's details

Company name

Network name (if applicable)

Contact name

FCA firm reference number

Address

Postcode

Telephone

Email

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10/2026

Section 3 - Customer declaration

I request the appointment of the adviser specified above.

I confirm the above named adviser firm is replacing any previous adviser appointed to my product(s) listed in Section 1, and that this authority will remain in place until I notify you otherwise.

I accept that by appointing an adviser, you will send correspondence primarily to them unless I have requested otherwise - or if I notify you that I wish to cease to use their services.

I give my authority for Nucleus to accept instructions from my adviser as if they were from me, where the provisions of the product allow.

Customer signature

Customer name

Date (DD/MM/YYYY)

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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