

Client authority – initial fees on top ups and/or regular contributions

 0131 226 9535
  client.relations@nucleusfinancial.com
  Nucleus client relations, PO BOX 26968, Glasgow G2 9DY

 Please arrange to have this form completed and signed by the client(s) before sending to us at the above address or via Jira messaging. If any party signs but fails to date a signature, the date that we receive the fee form will be deemed to be the date that the signing party signed the agreement.

 If you've any questions please contact your regional client relations manager who'll be delighted to help.

Client details

Name(s)

Name(s)

Nucleus account number

Account type e.g. general account

N

Type	Lump sum top up	Transfer in	Regular contribution (employee)	Regular contribution (employer)
Additional investment amount	£	£	£	£
Initial fee payable	£/%	£/%	£/%	£/%
Frequency of regular contribution e.g. monthly	Not applicable	Not applicable		

If you have agreed to pay ongoing adviser charges on a flat fee basis, please note:

Charges accrue daily and are calculated using an annual rate, so the amount deducted each month may vary depending on the number of days in that period. As a result, the monthly payment may be slightly higher or lower than expected.

I hereby authorise Nucleus to pay my adviser the above fees(s) on my additional investment(s).

Client/First trustee signature

Signed

Print name

Date

Joint holder/Second trustee signature

Signed

Print name

Date

Third trustee signature

Signed

Print name

Date

Fourth trustee signature

Signed

Print name

Date

Note: all individual trustees must sign so if there are more than four please photo copy the this page and delete the trustee numbers and replace as necessary.

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.



0131 226 9535



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www.nucleusfinancial.com

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