nucleus

Nucleus Go client view

Nucleus platform user guide

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1.0 Introduction

This document is an adviser's guide to Nucleus Go, the client portal of the Nucleus platform.

In this guide you'll find:

- instructions on how to access Go as an adviser
- an overview of all the features available to your client
- where the information on Go is available on the adviser portal

2.0 Accessing Go as an adviser

You can log in to Go to see exactly what your clients see, but in read-only mode.

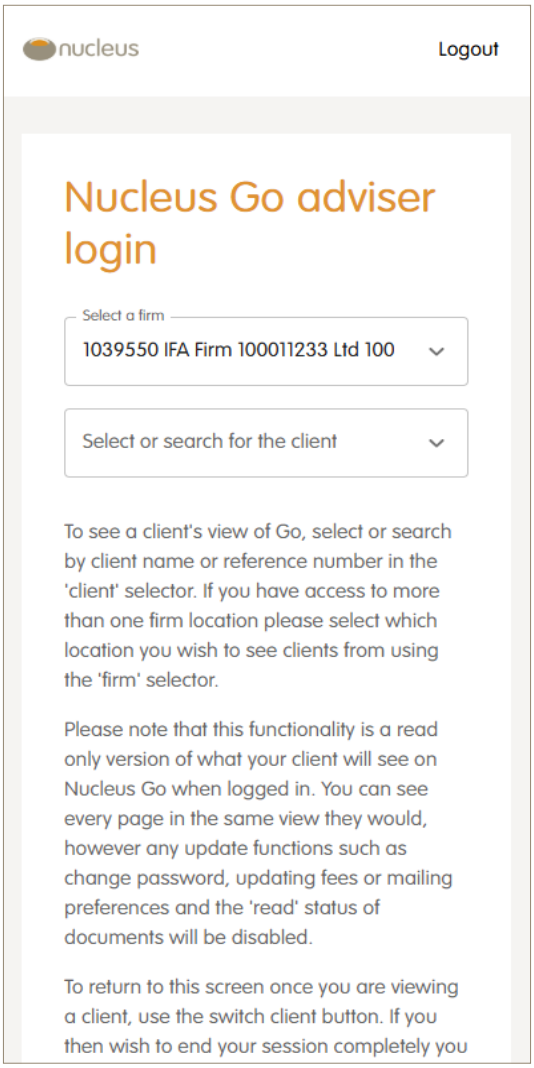
2.1 Log in

Log in to Go at go.nucleusfinancial.com using your platform username and password and you'll be redirected to the client search page.

If you'd like to change your password this will need to be done via the adviser platform and can't be changed in Go.

2.2 Searching for clients

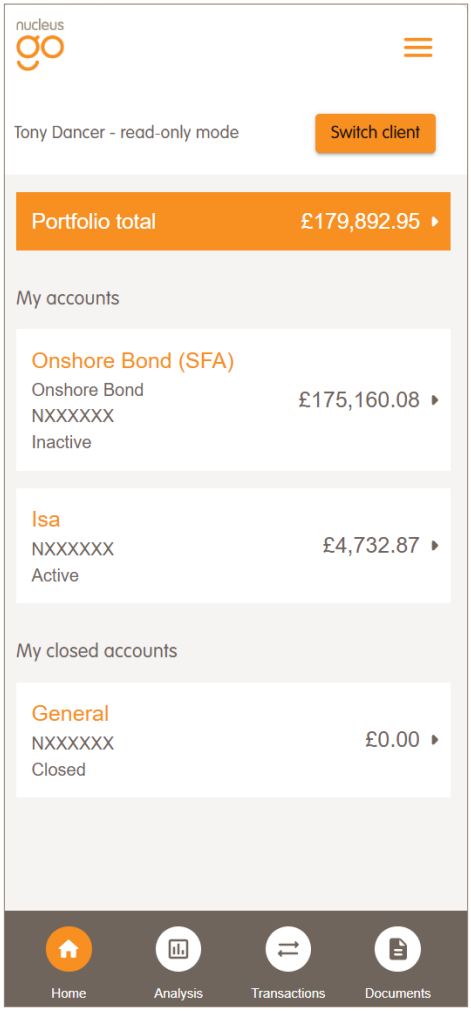
Search for your clients either by typing their name or client reference number, or simply choosing the client from the drop down. If you've access to more than one location, you can choose the firm from the drop down.

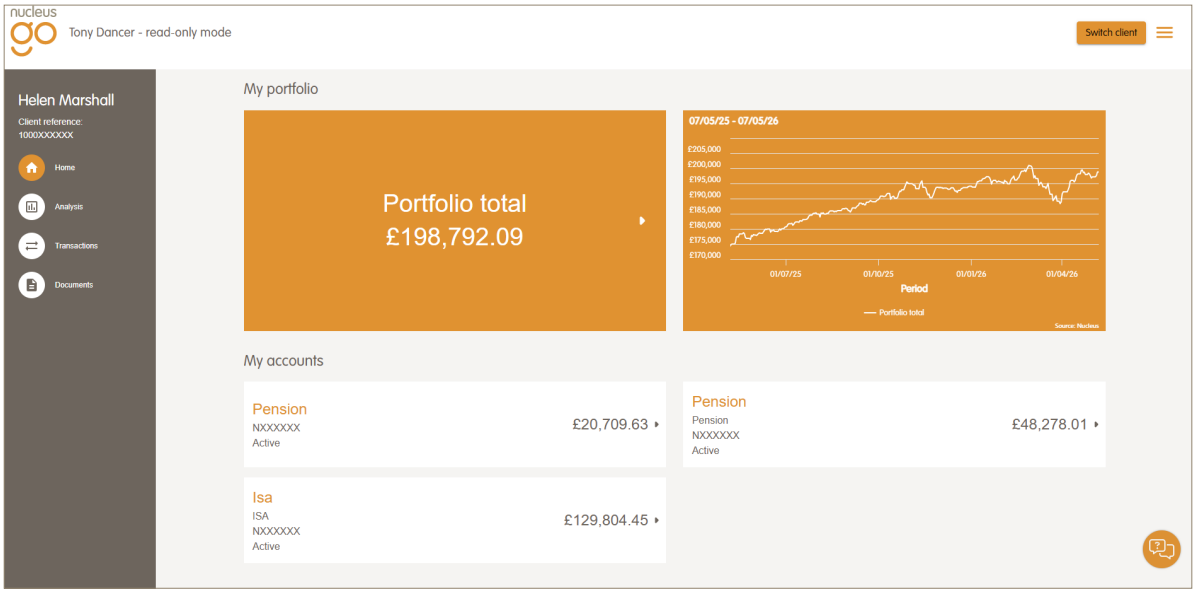


2.3 Switching clients

With adviser access you can simply switch between clients on Go by clicking the 'Switch client' button. This will redirect you to the client search page.

From this page or from the menu on the right-hand side of each page, you can log out of Go.

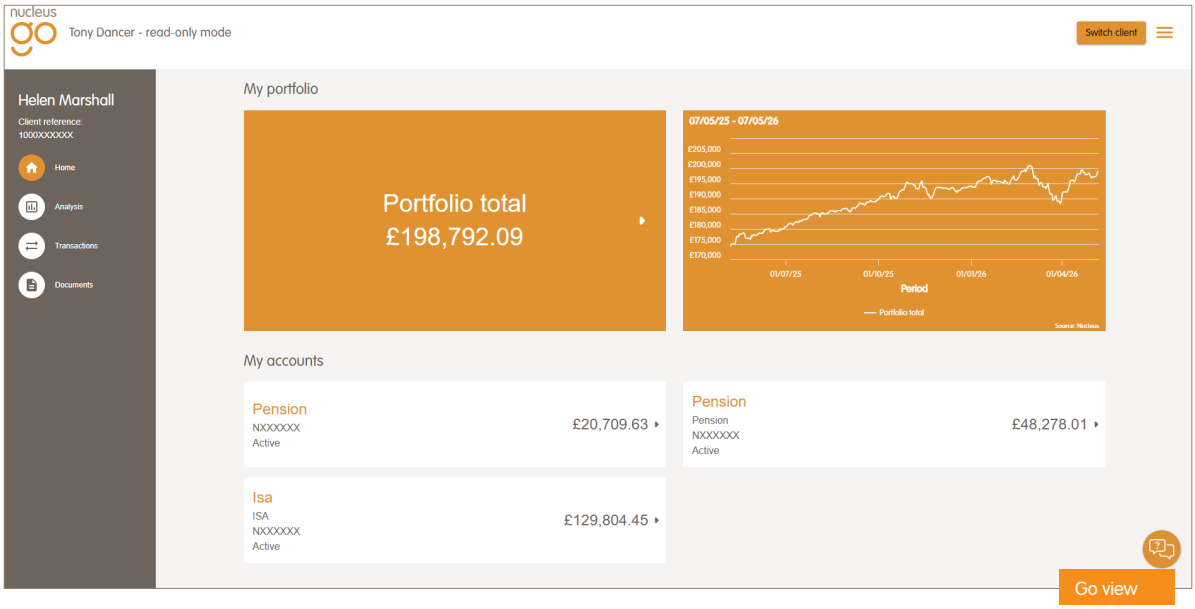




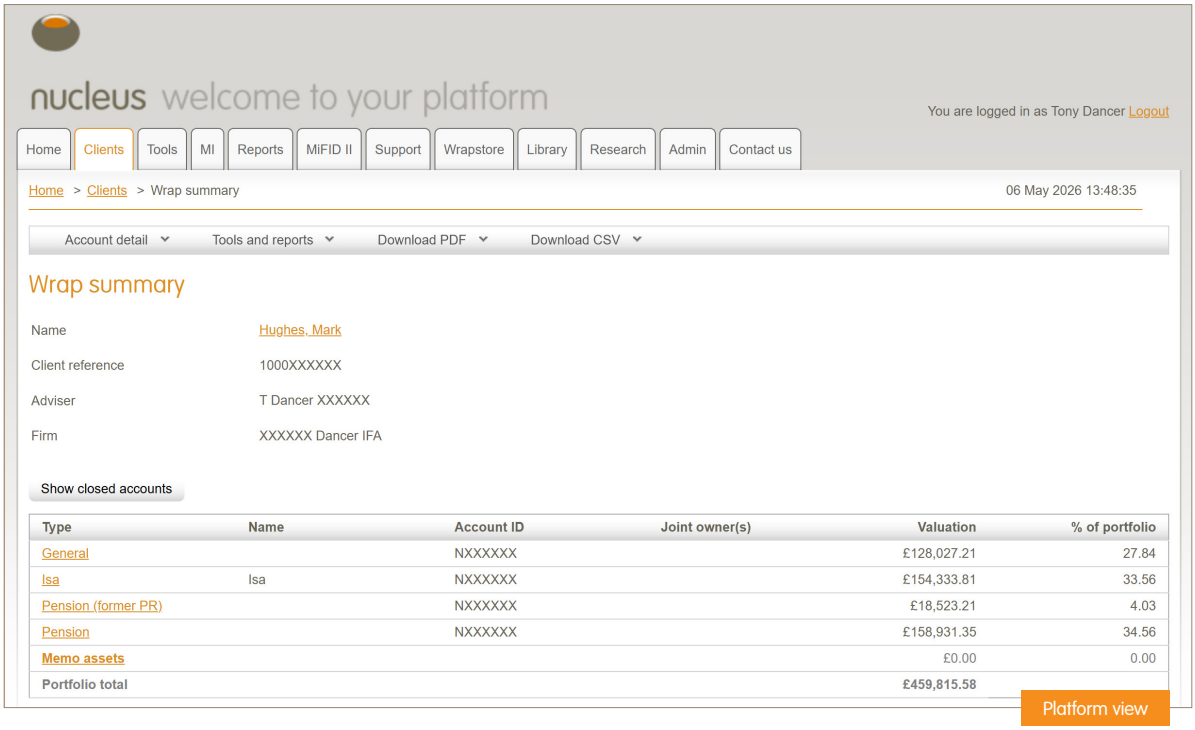
3.0 Nucleus Go features

3.1 Homepage

On the homepage of Go, once you've selected a client, you can view the assets and values for their entire portfolio. This is the same information you see in the accounts section of the wrap summary page on the platform.



Go view

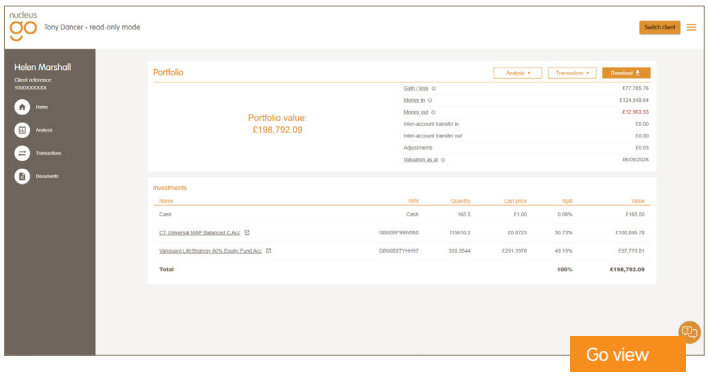


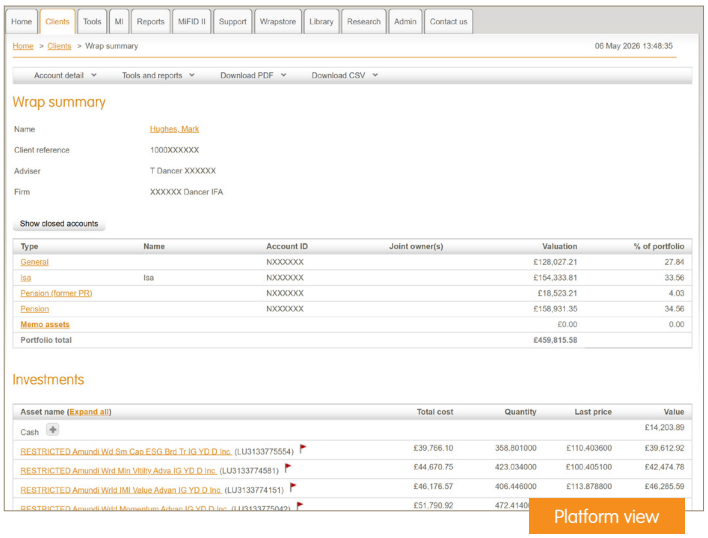
Platform view

3.2 Account / portfolio summary

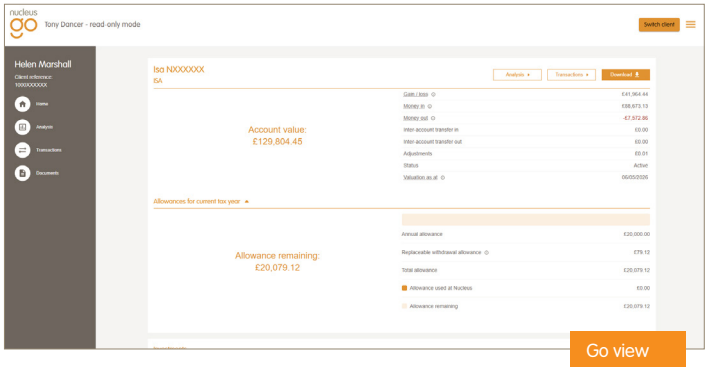
- Clients can view a summary of their portfolio or individual accounts.
- The portfolio summary shows investment totals for all client accounts, similar to the wrap summary page on the platform.
- The account summary page shows the investments for specific accounts, similar to the account details page on the platform. This page also shows details of model portfolios, regular contributions and withdrawals, and for pension and Isa accounts, total contributions in the current tax year.
- These pages also summarise the following information for the life of the client's accounts: gain/loss, money in, money out, Inter-account transfer in, Inter-account transfer out and adjustments. You can view all of these in the transaction breakdown component in Narrate reporting.

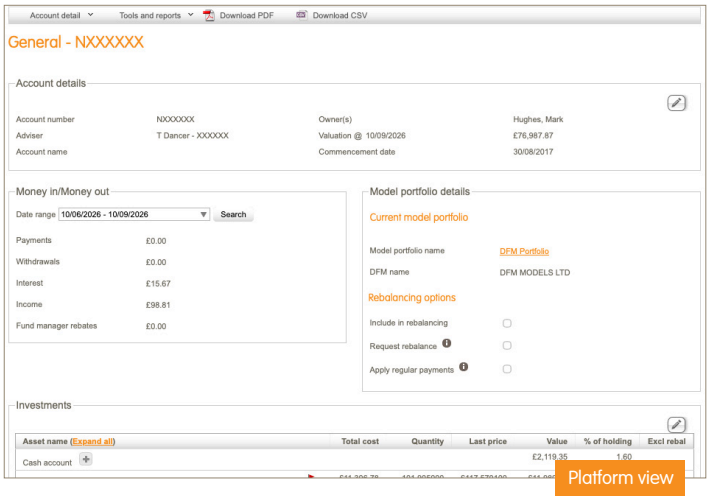
Investment holdings





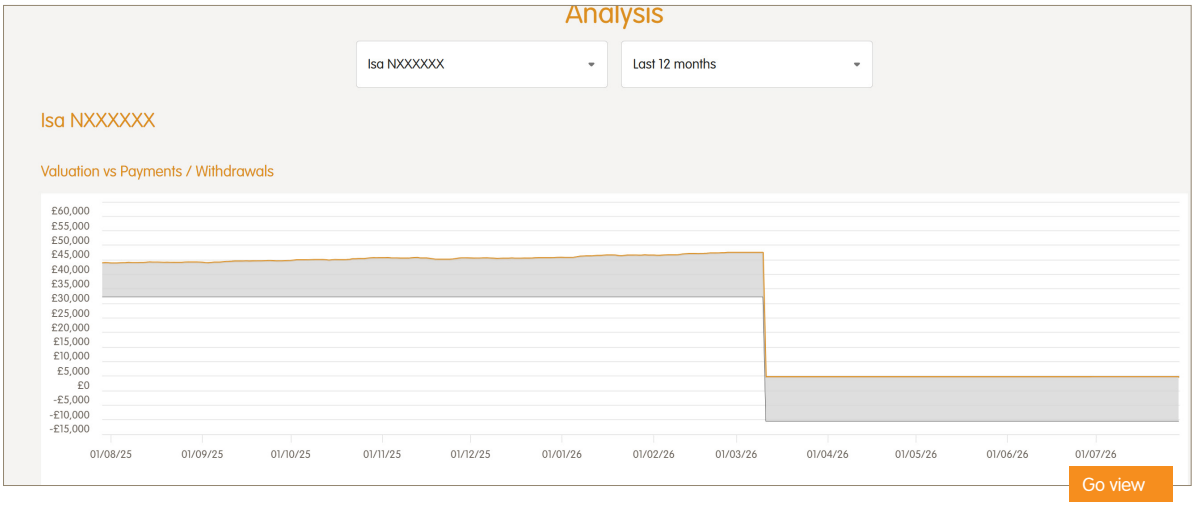
Available on account summary only

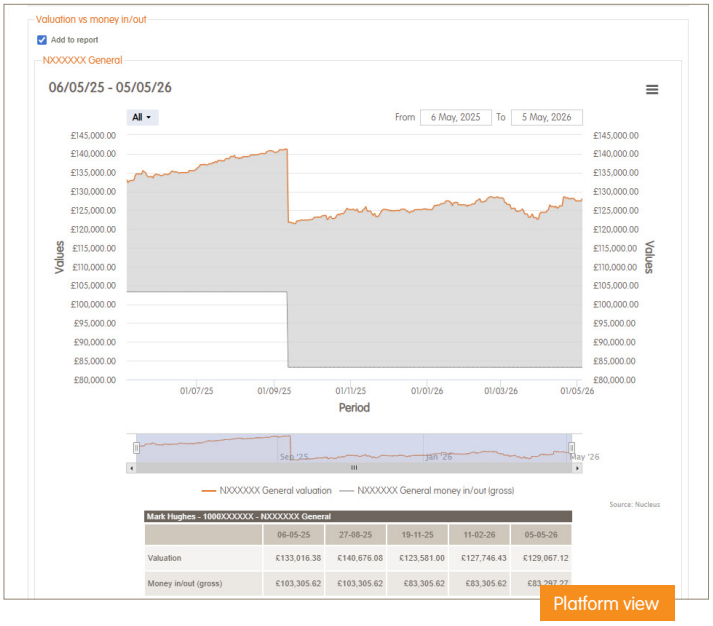




3.3 Analysis

The analysis page can be accessed from the account summary or by selecting 'analysis' from the side menu. The analysis graph shows the daily values of the account or total portfolio and any money in or out during the same period. You can see the same analysis information as your clients on Narrate, our portfolio reporting tool.

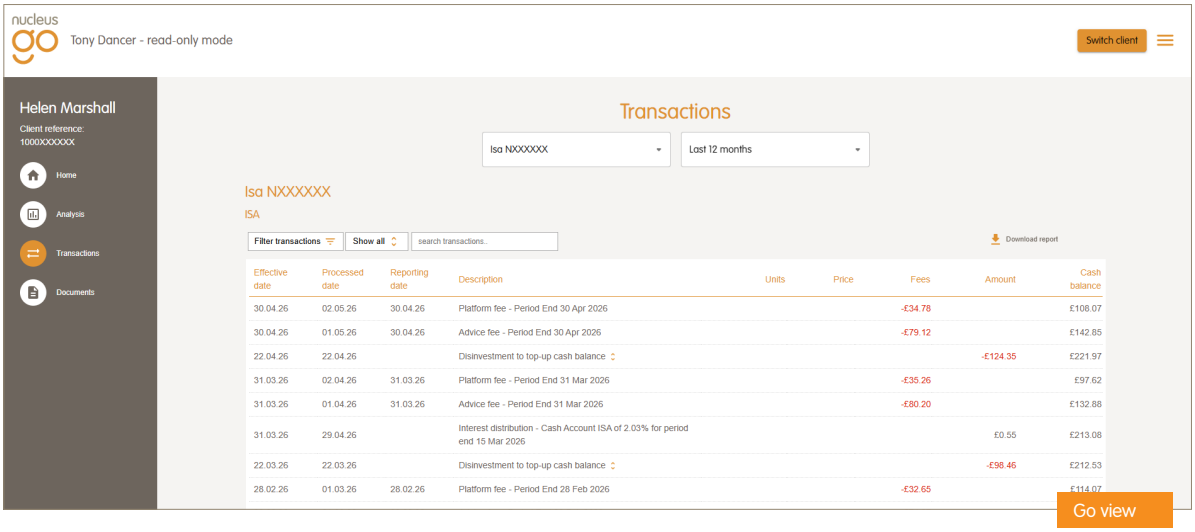


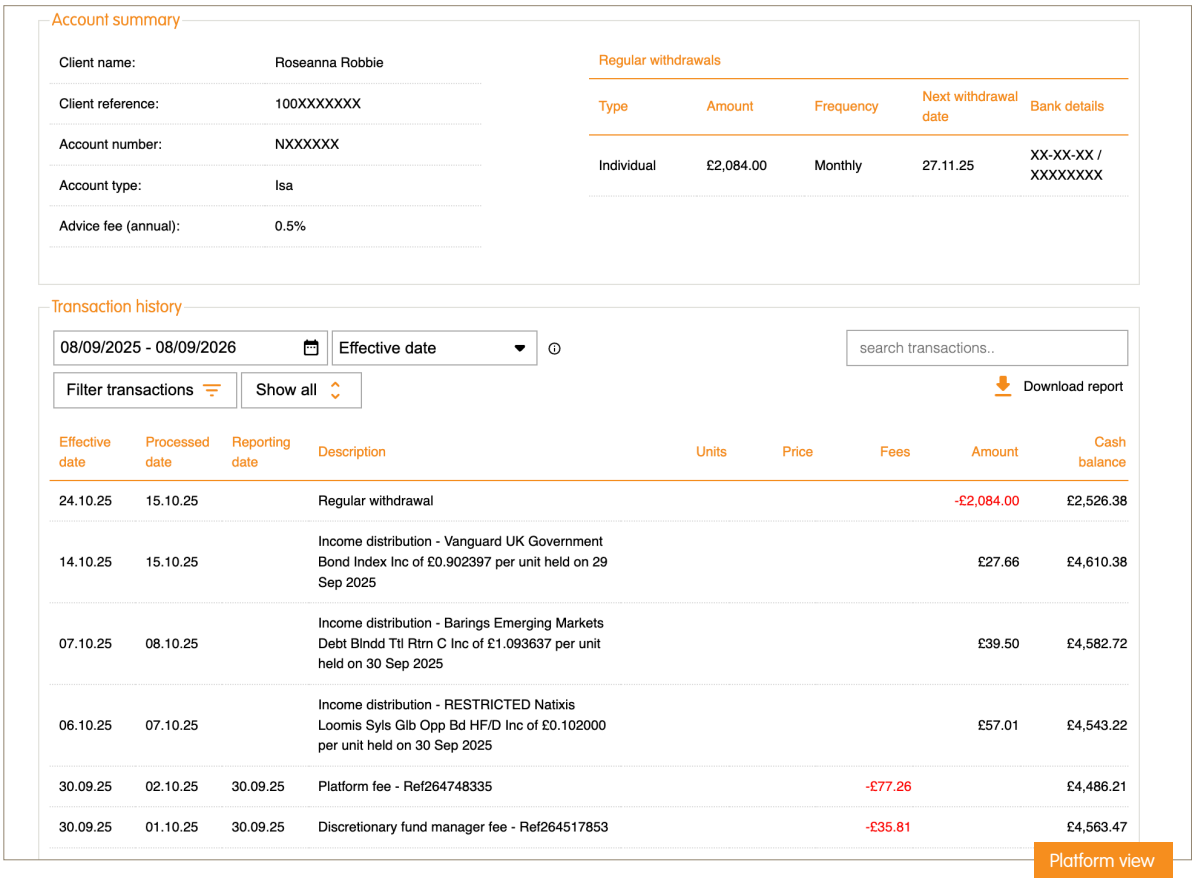


3.4 Transactions

The transactions page can be accessed from the portfolio summary page for a specific account or from the side menu. This page contains the same information as the transactions page of the adviser platform and includes the same filter and export features.

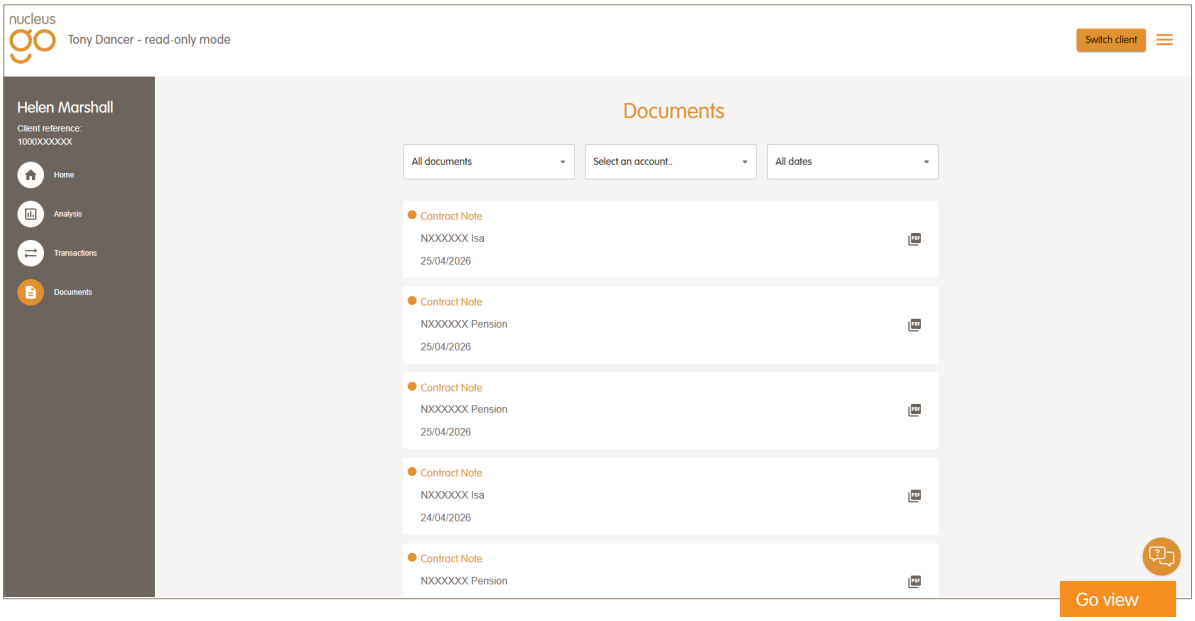
Client access to the transactions page is controlled through the adviser platform via the view client screen, so you can opt your clients out of this view if required. Please note, if you choose to do this you won't be able to view this page on Go.



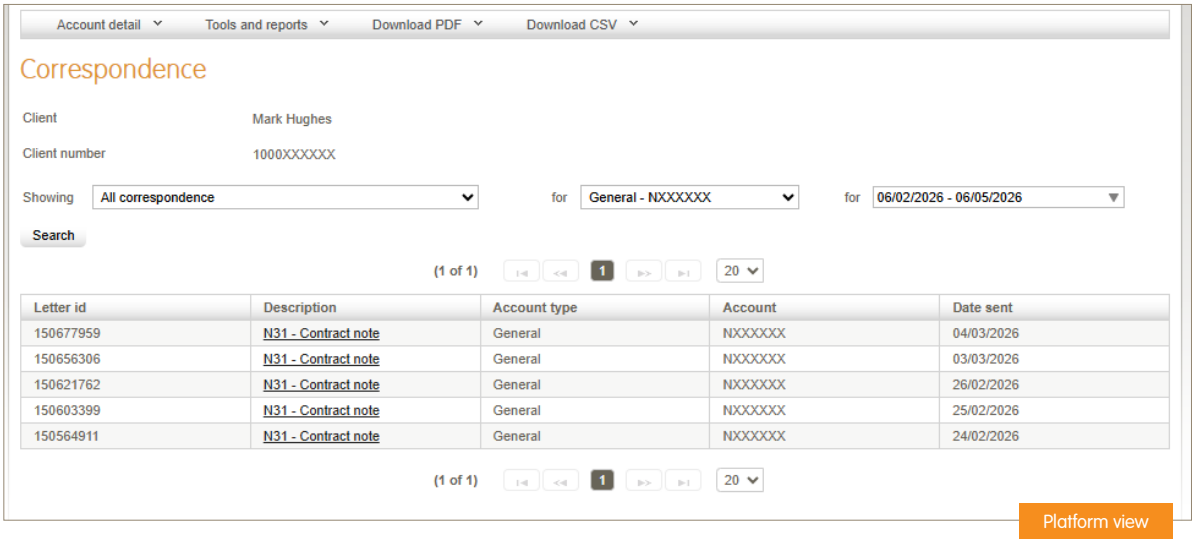


3.5 Documents

We're making it easy for your clients to view all of their account correspondence and documentation online. Clients can view and download all of their correspondence by clicking on 'documents' in the side menu of Go.

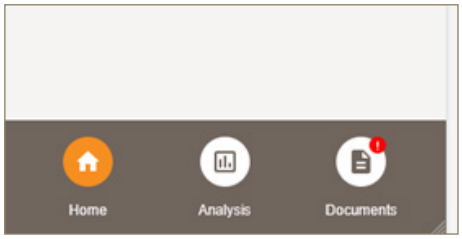


Go view

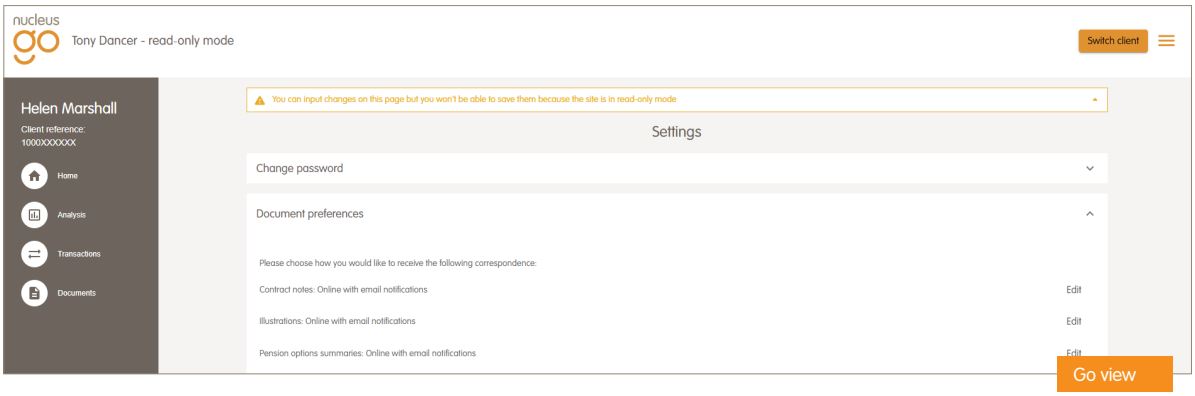


Platform view

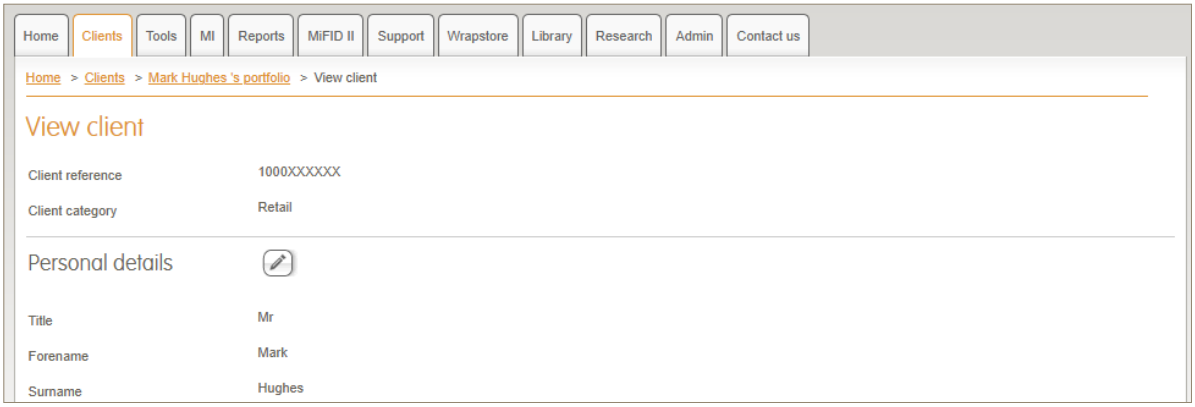
We've added a flag to Nucleus Go so that client's can easily see any unread correspondence since the last time they logged in. This will show as a red notification against the documents icon.



Clients can also update their correspondence delivery preferences on the 'personal details' page. Note that when logged in to Go as an adviser in read-only mode, you'll not be able to save any changes to your clients' correspondence delivery preferences, you can update these directly on the platform.



Go view

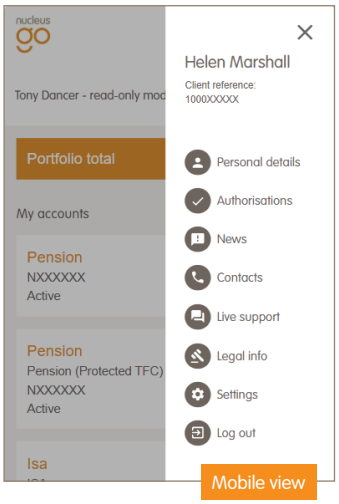




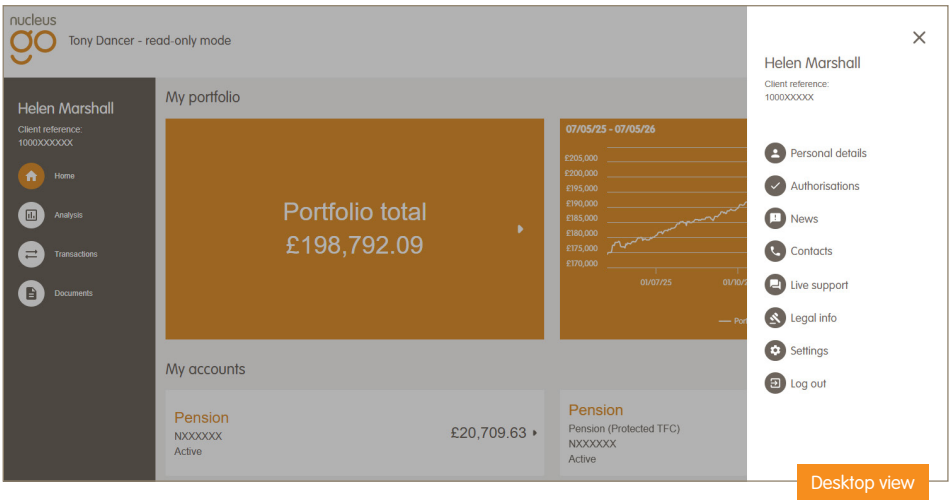
Platform view

3.6 Authorisations

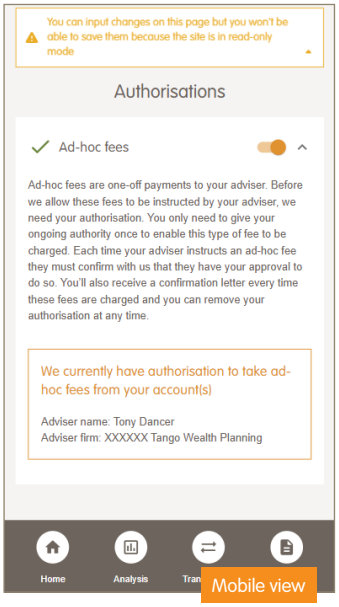
Clients can easily grant authority for ad hoc fees to be requested on an ongoing basis without the need to complete a paper form. The current status of their authorisation preferences, along with the terms and conditions of this feature can be viewed by clicking on 'authorisations' in the side menu.



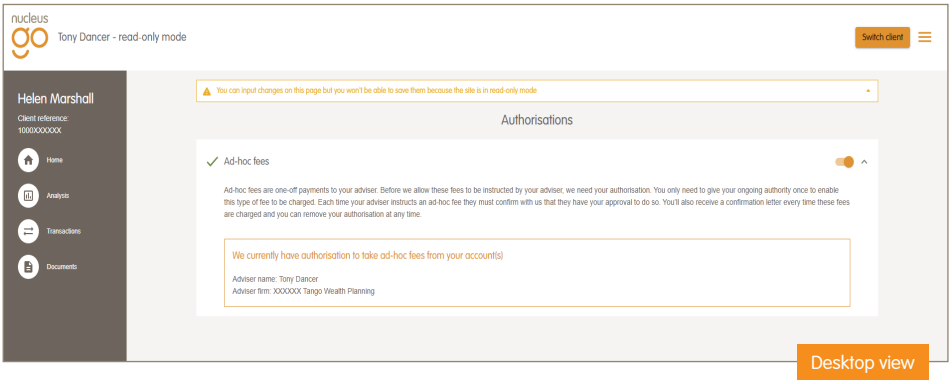
Mobile view



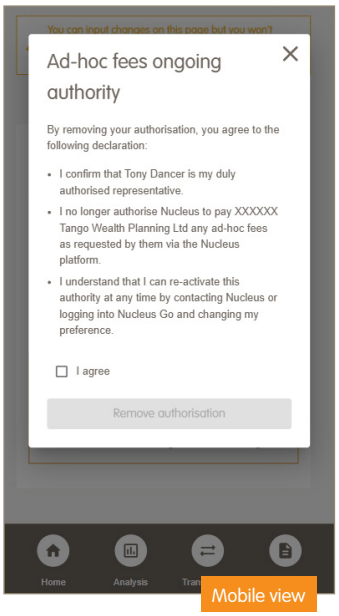
Desktop view



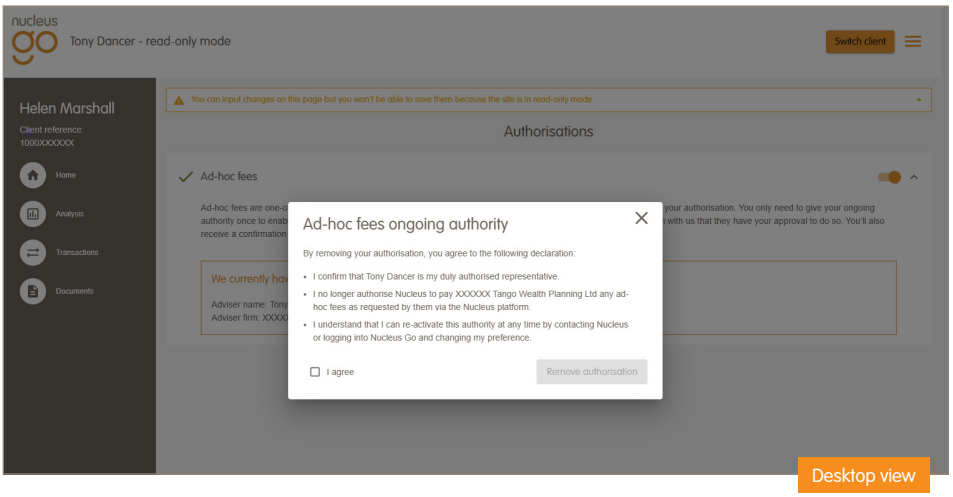
Mobile view



Desktop view



Mobile view

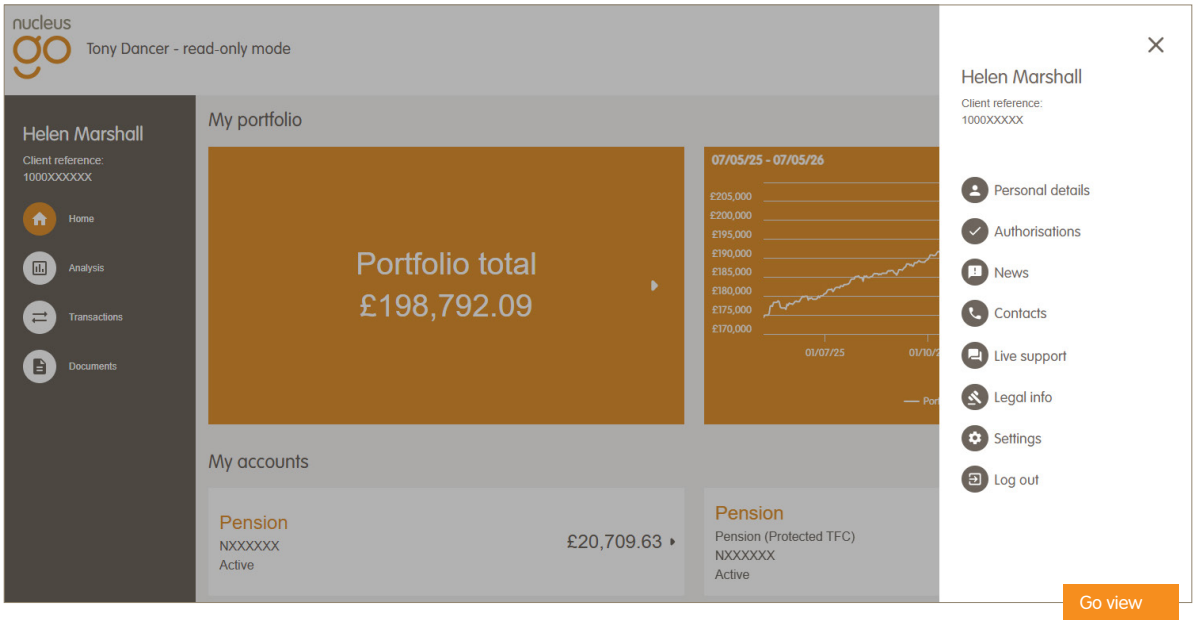


Desktop view

To authorise ad hoc fees, clients need to read and tick the 'I agree' box before hitting the 'authorise' button. Once completed, the authorisation will be switched on to confirm that ad hoc fees can be taken from the client's account on an ongoing basis. When logged in with adviser access, you'll be able to interact with this page but you'll not be able to save any changes.

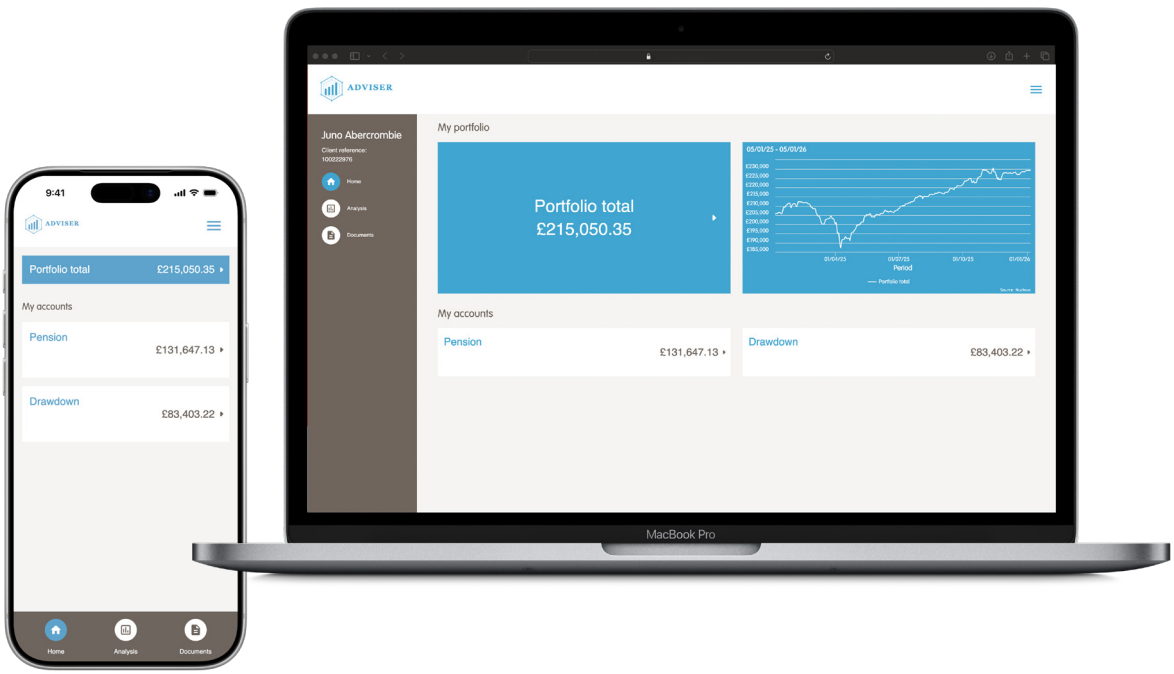
3.7 Other features

In addition to the core features of Go, we've added some additional enhancements including a newsfeed, which means we can keep clients up to date with news and updates to their site. This includes new features as they're developed, as well as maintenance and availability updates. Clients can easily view your contact details and ours if they need to contact us.



3.8 Firm branding

Go will incorporate any existing firm branding, which is designed to enhance your client proposition. Firm branding adds value by supporting you in providing a consistent client experience.



4.0 Go iOS app

Nucleus Go is available for download from the App Store. For the moment, this is only available on Apple devices.

4.1 Downloading the app

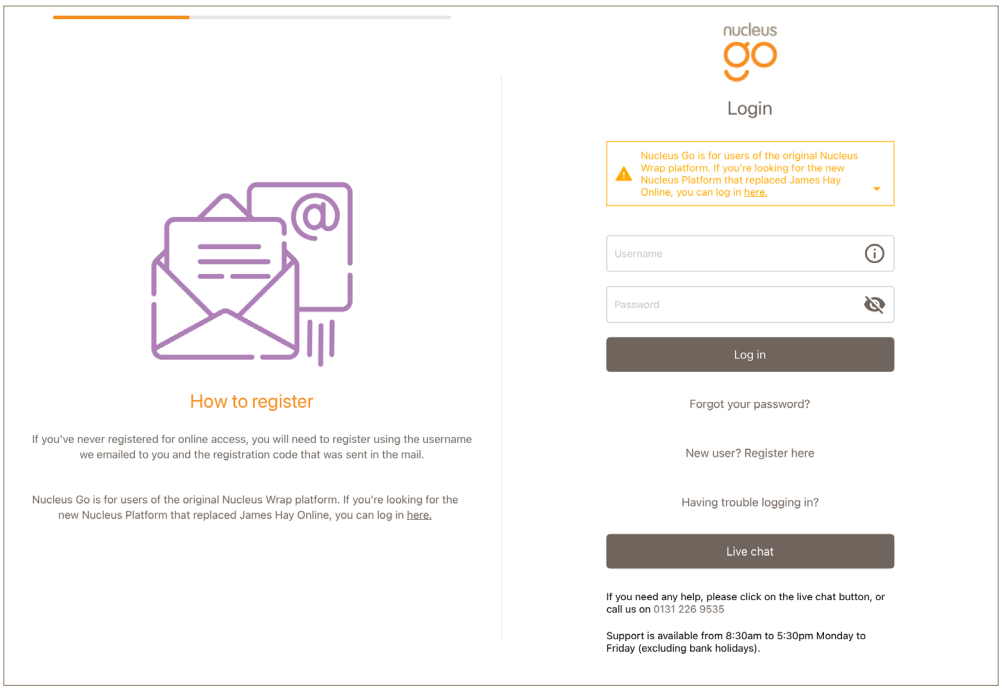
To download the app, open the app store on your device. Key words that can be used to search are Nucleus Go, wrap platform, Nucleus and Finance.

4.2 App specific features

There's a number of features which are specific to the iOS app and differ slightly from the traditional Nucleus Go website. This is because we can use iOS features to optimise the user experience.

4.2.1 Onboarding stepper

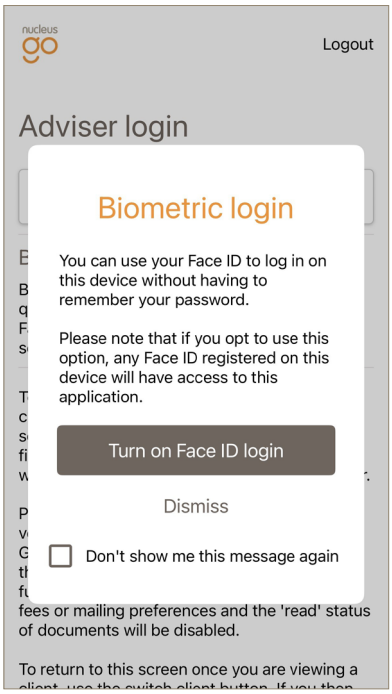
When the user downloads the app for the first time, they'll be presented with a series of screens (as displayed below) which shows the app and its features. They can then simply log in or register from here. This will only show prior to the first time the user has logged in. To see it again, the user will need to delete and re-install the app.

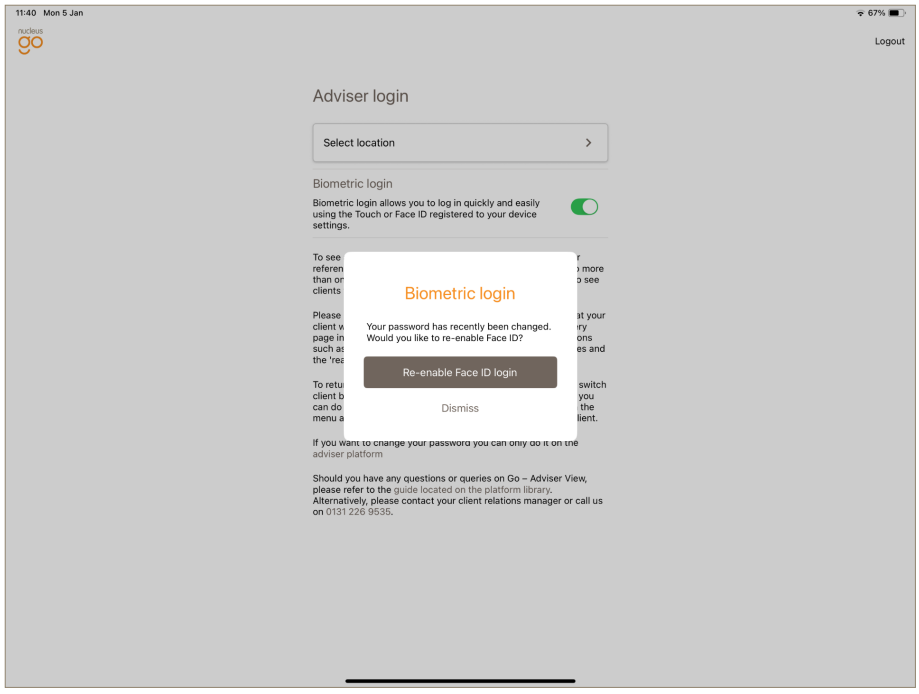


4.2.2 Biometric login

Users can login using face ID or touch ID (depending on device) which is set up at registration or via the settings page in the menu on the top right of the screen.

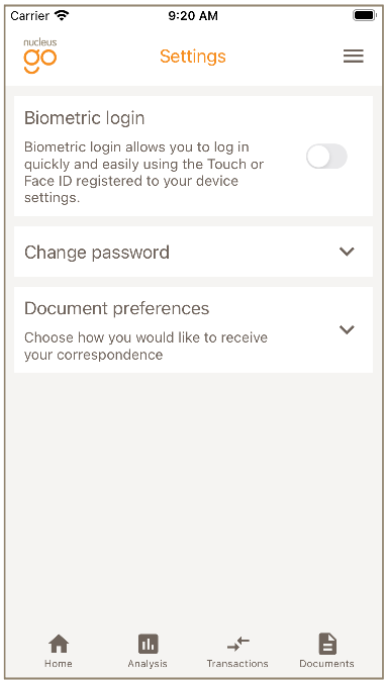
On registration or first login, the user will be presented with the option of selecting to enable biometric login. The pop up message allows the user to enable or dismiss this type of login, and choose whether they'd like to see this message again, which if selected, will not show at their next login. This can be switched on or off at any time via the settings menu (see settings section for more information). If biometrics aren't enabled on the device, the option will be greyed out on the settings page.

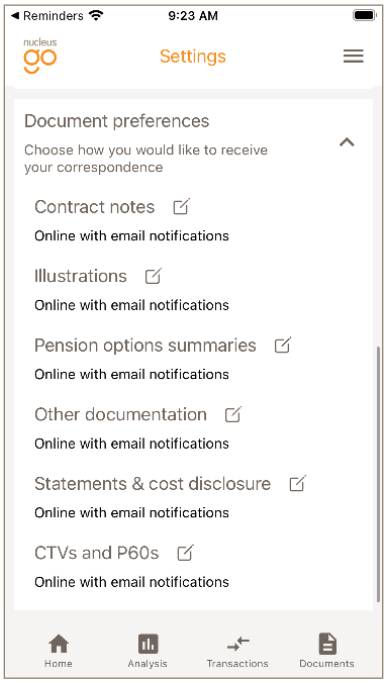


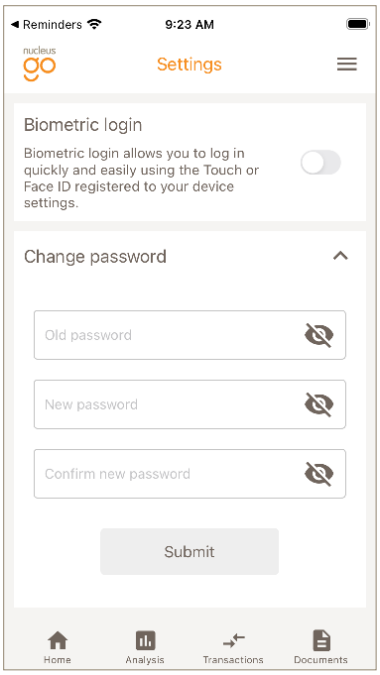


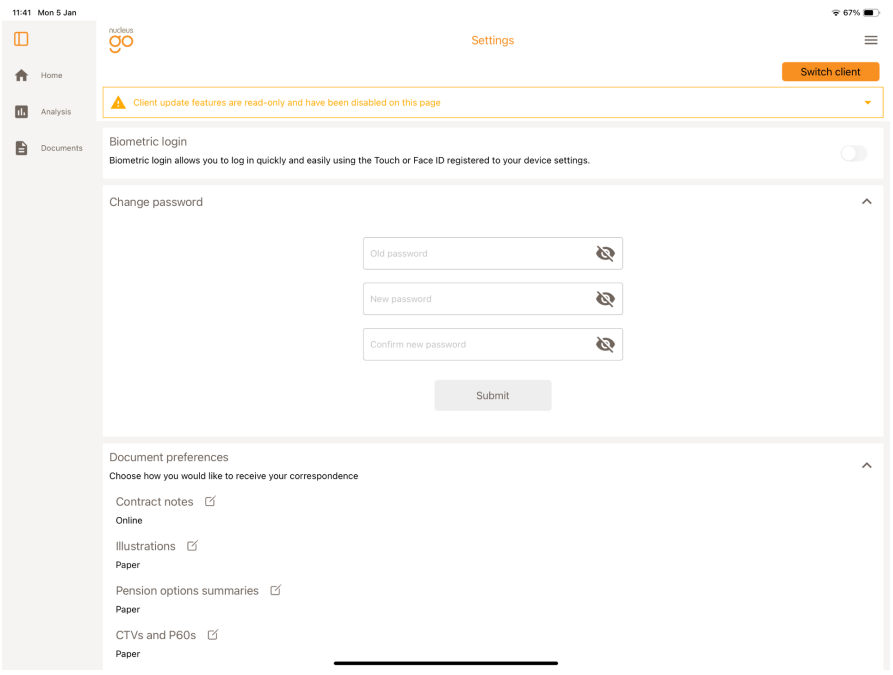
4.2.3 Settings page

We've created a new settings page within the menu to hold the biometrics settings. We've also moved the option to change password and document preferences from the personal details section into this page for the app.



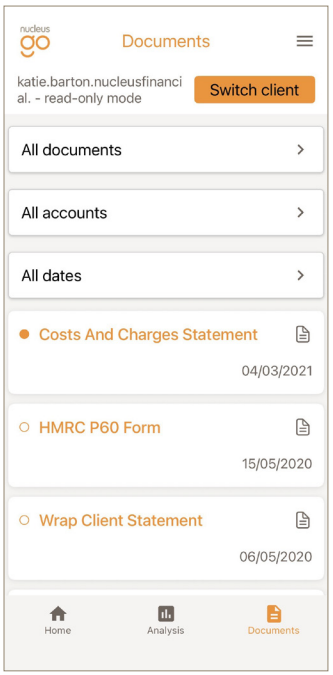


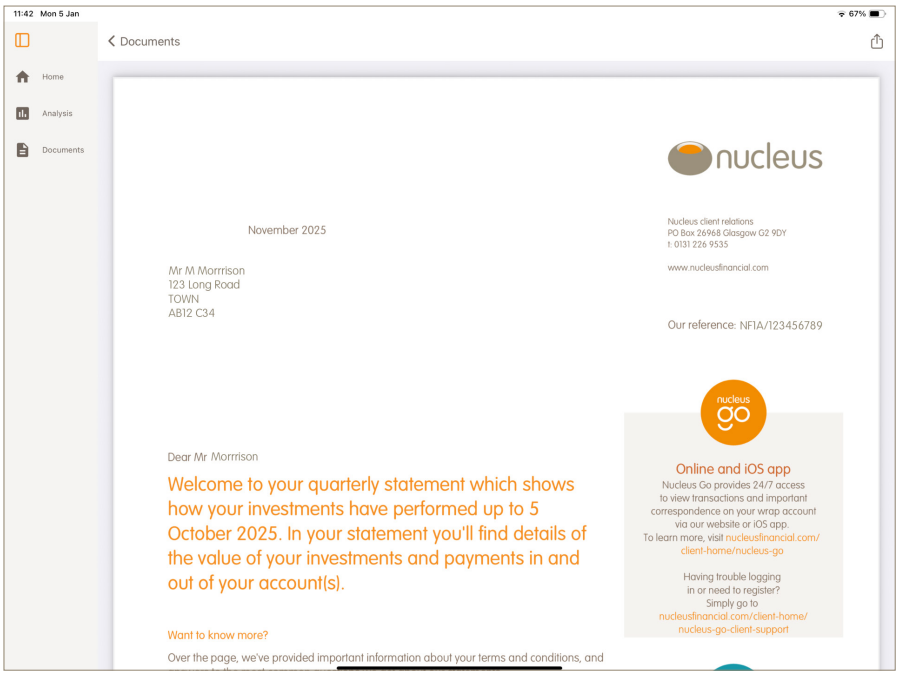




4.2.4 Documents screen

Improvements have also been made to the documents screen in order to utilise some of the iOS operating features. Users can view the document within the app and also use the share button to save and share with other apps.





5.0 Adviser view on iOS app

Adviser view is available via the Go iOS app and functions in the same way as the online Go website with the option to view all clients in a read only format, as well as searching and switching between your clients. Biometric settings for advisers are available via the client search page, which is enabled via the menu installed on the search page.

0131 226 9535 client.relations@nucleusfinancial.com www.nucleusfinancial.com

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