For advisers

Our new platform

nucleus platform

How to process a JISA single payment and transfer payment top up application

3 minute read

How to process a JISA single payment and transfer payment top up application

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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.

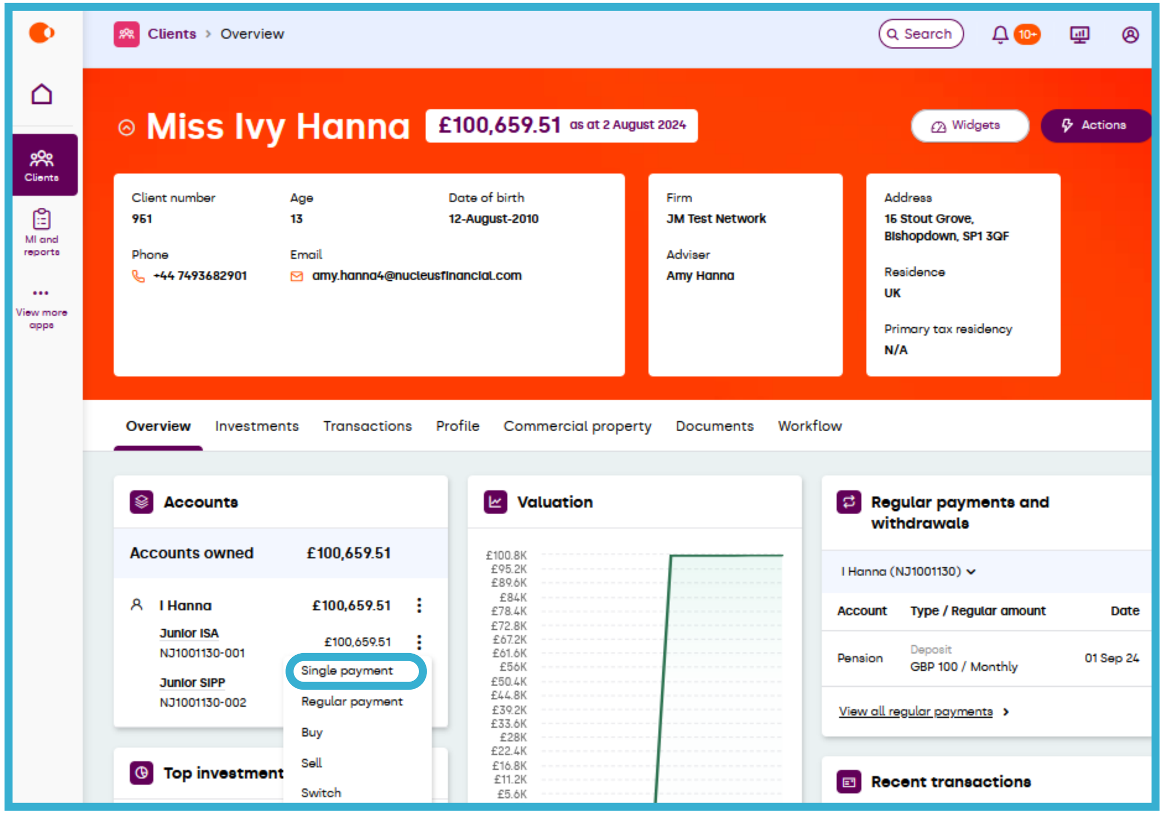
We recommend using the zoom function to view the details on the platform screens in this guide.

How to process a JISA single payment and transfer payment top up application

To start the JISA top up application, 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 home page, within accounts, select the vertical ellipses (three dots) on the JISA, to set up the single payment.

A list of actions will appear. To create the top up application, select '**Single payment**'.



Key message

At any stage of the top up application, you can save and exit the application.

To resume the top up application, navigate to the workflow tab within the client's account.

Payments in

Confirm if financial advice has been provided to the client.

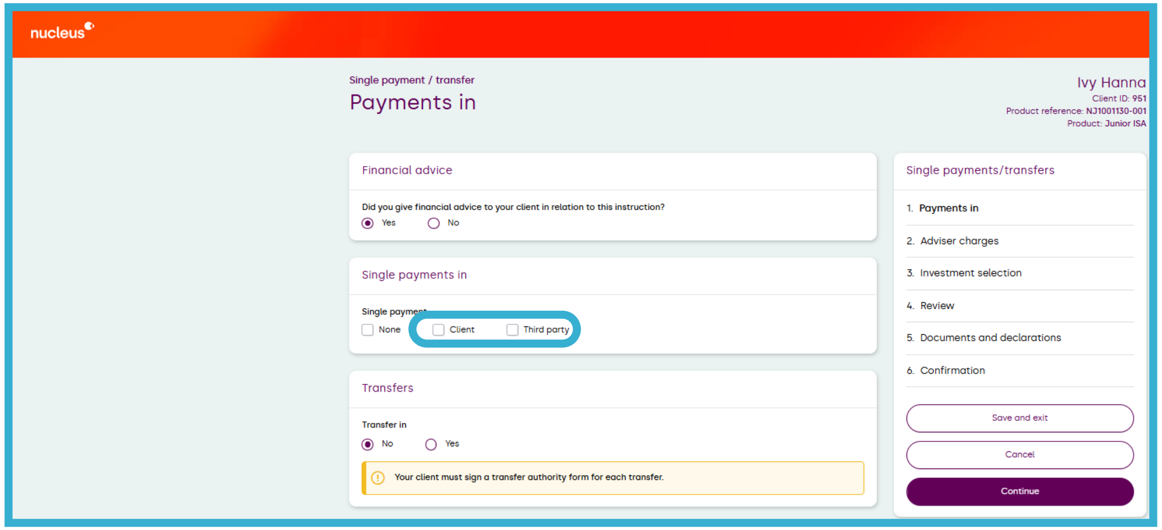
Key message

You can select a top up payment and transfer in within the one application.

If the client is between 0 to 15 years and 10 months old, the only payment method that will be available is third party.

For clients who are 15 years and 11 months to 18 years old, the client payment method will also be available.

Select either '**Client**' or '**Third-party**'.



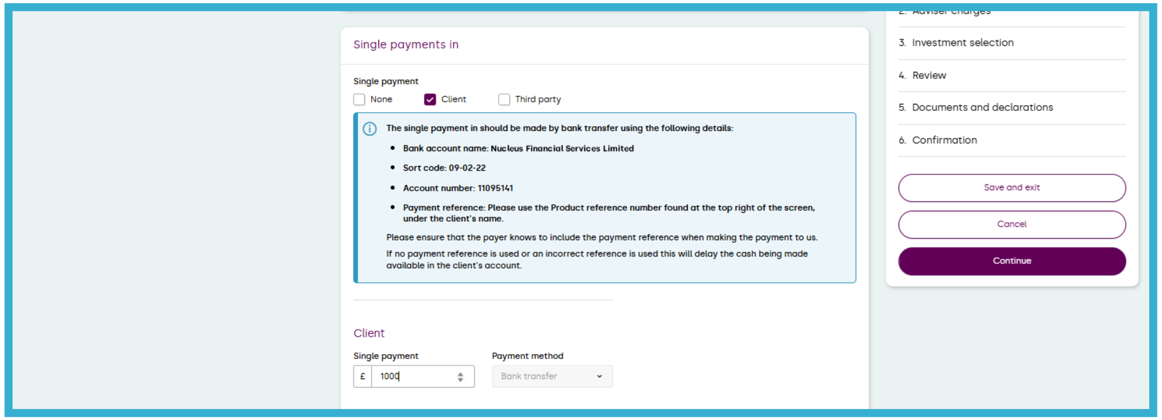
Client single payments

Select client single payment.

Enter single payment details.

The payment method will automatically default to bank transfer.

Single payments must be sent via bank transfer using our bank details, located on our website. Include your client's account number, located at the end of the application, as the payment reference to avoid processing delays.



Third-party payments

Select '**Third-party**' payment.

Enter the third-party single payment in details.

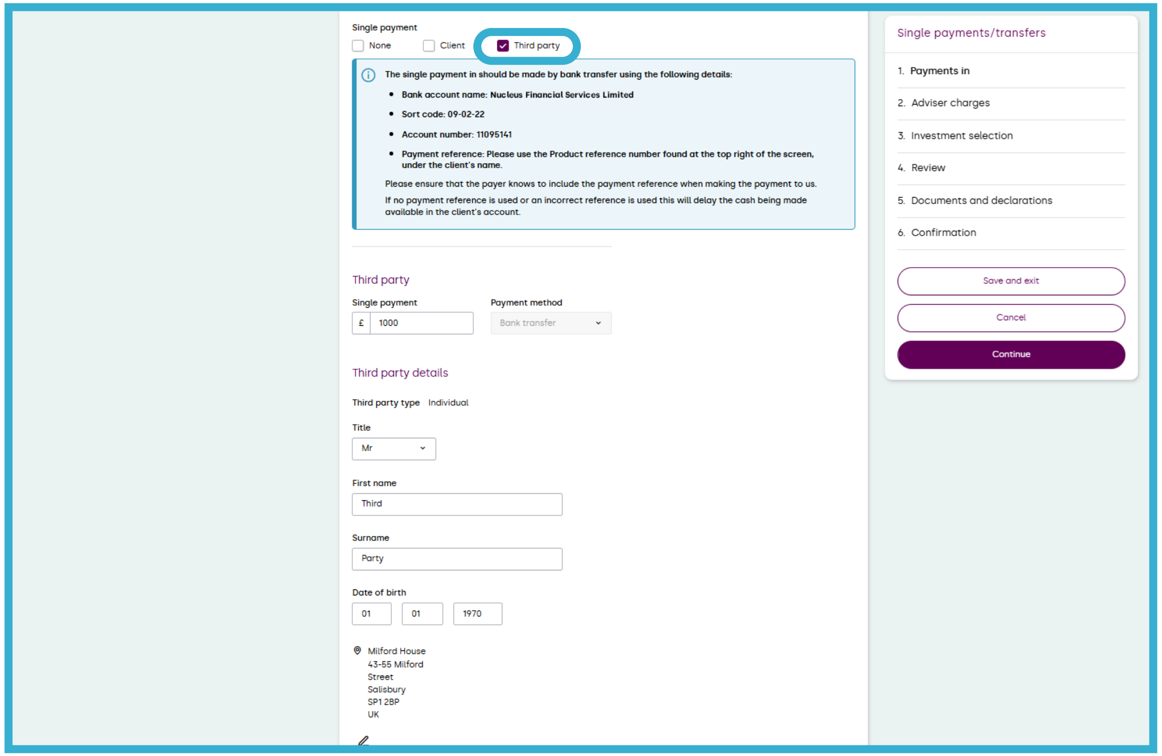
The payment method will automatically default to bank transfer.

Enter the third-party's personal details.

Enter the third-party's address into the search bar and select the address from the results.

Alternatively, you can enter the third-party's address manually.

Single payments must be sent via bank transfer using our bank details, located on our website. Include your client's account number, located at the end of the application, as the payment reference to avoid processing delays.



Transfer payments

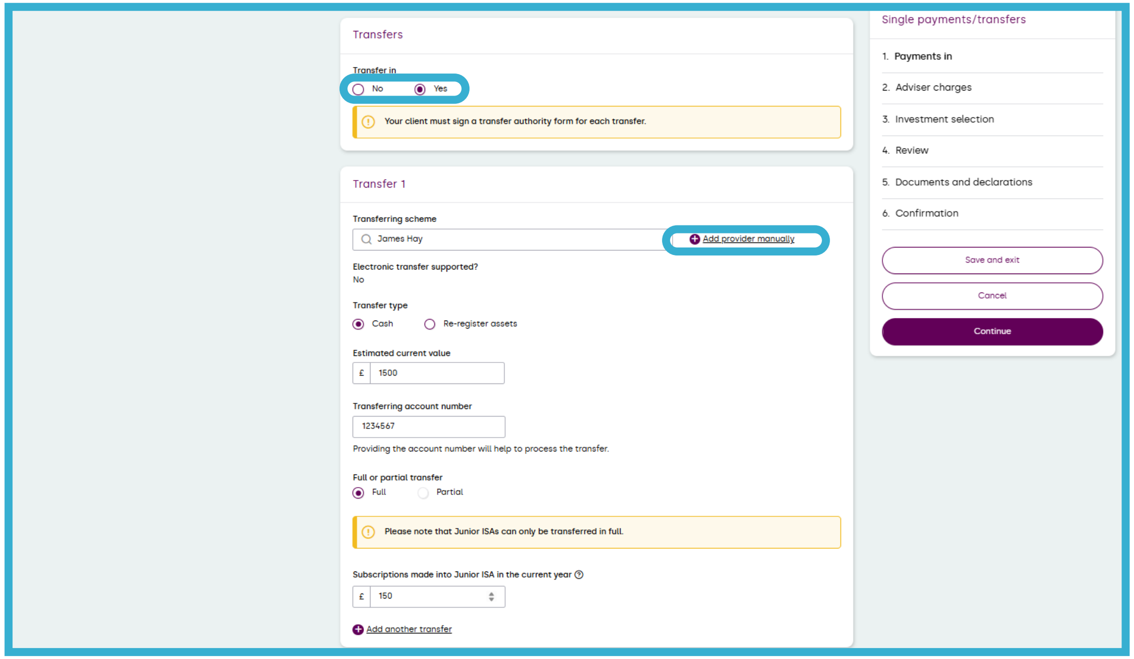
Select either '**No**' or '**Yes**'.

Enter the ceding provider's name into the search bar and select the provider from the results.

Key message

If you're unable to locate the ceding provider using the search bar, you can add the details manually by selecting '**Add provider manually**'.

Select a transfer type.



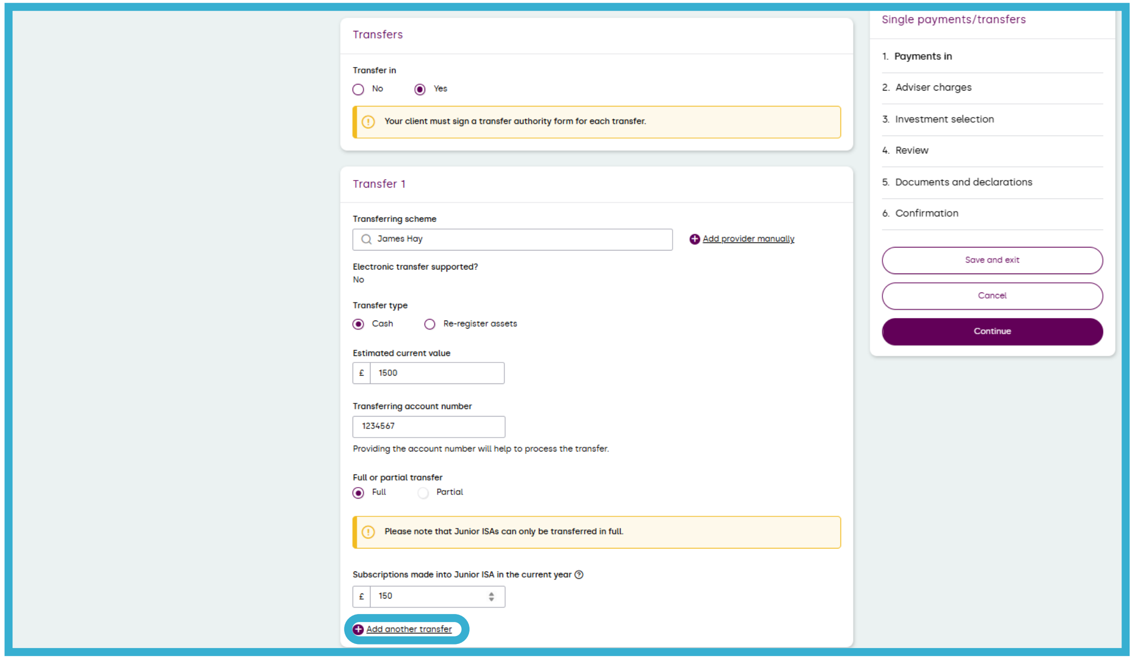
Cash transfer payments

Enter all the transfer details.

We don't accept JISA partial transfers. You must select '**Full**' transfer to proceed with the application.

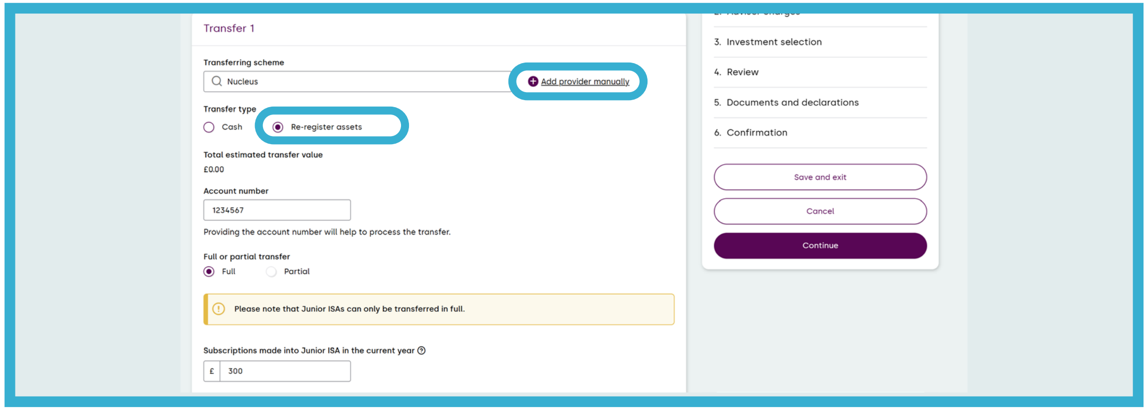
Confirm the JISA subscriptions that have been made into the JISA in the current tax year.

You can add multiple cash transfers from different providers. By selecting '**Add another transfer**'.



Re-registered assets

Enter the ceding provider's name into the search bar and select the provider from the results.



Key message

If you can't locate the ceding provider this way, you can select '**Add provider manually**'.

Select '**Re-register assets**' transfer type.

Enter all transfer details.

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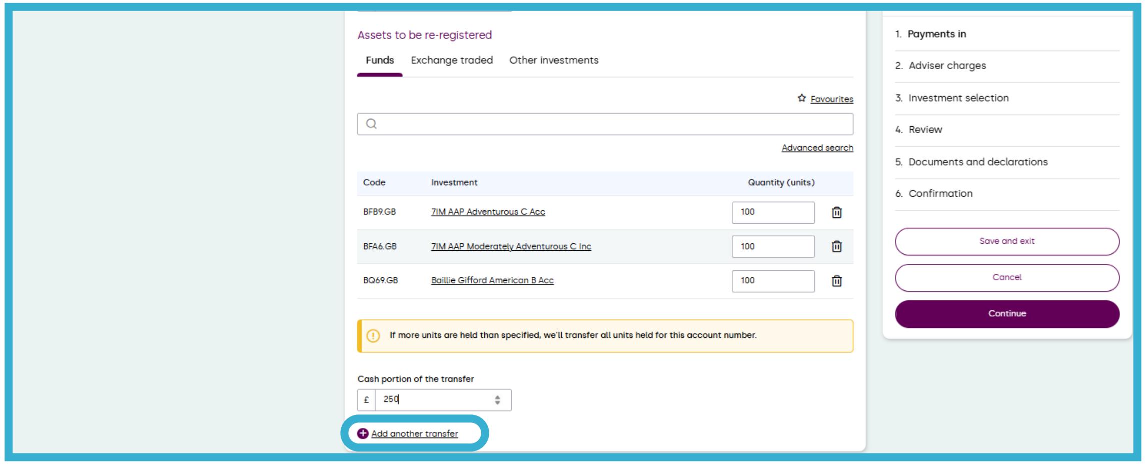
We don't accept JISA partial transfers. You must select '**Full**' transfer to proceed with the application.

Confirm the JISA subscriptions that have been made into the JISA in the current tax year.

Enter the assets that will be re-registered into the search bar. Enter the asset's units.



Key message

You can use either the ISIN or SEDOL number to search for a fund. If any fund you require is suspended, please contact us.

Enter the cash portion amount of the transfer.

You can add multiple re-registration transfers from different providers by selecting '**Add another transfer**'.

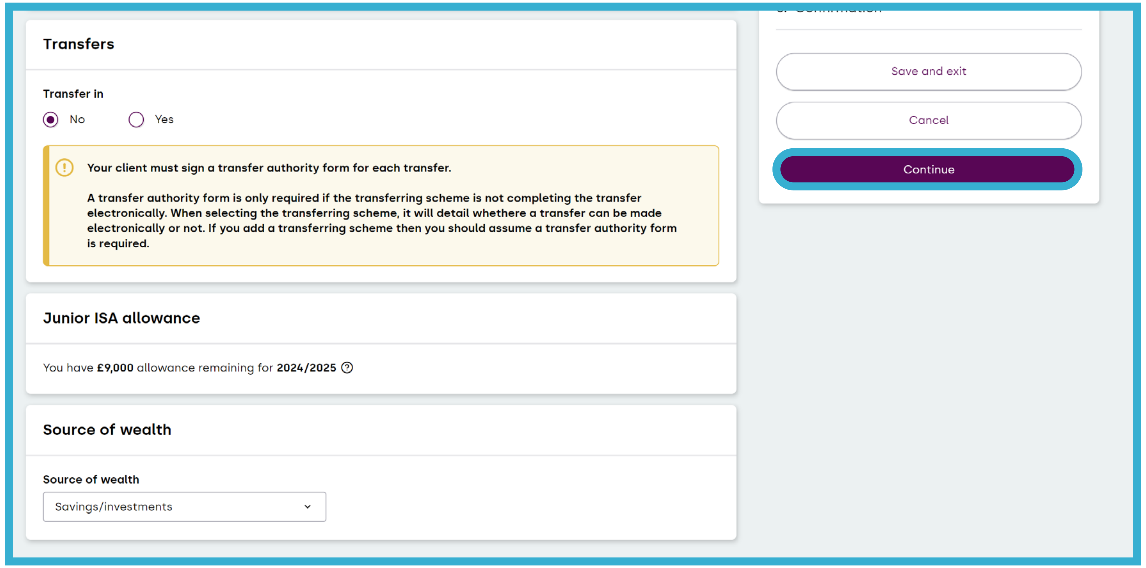
Key message

This section informs you of your clients remaining JISA allowance for the current tax year.

The remaining allowance is calculated using the details entered on this page.

Confirm the source of wealth from the drop-down list.

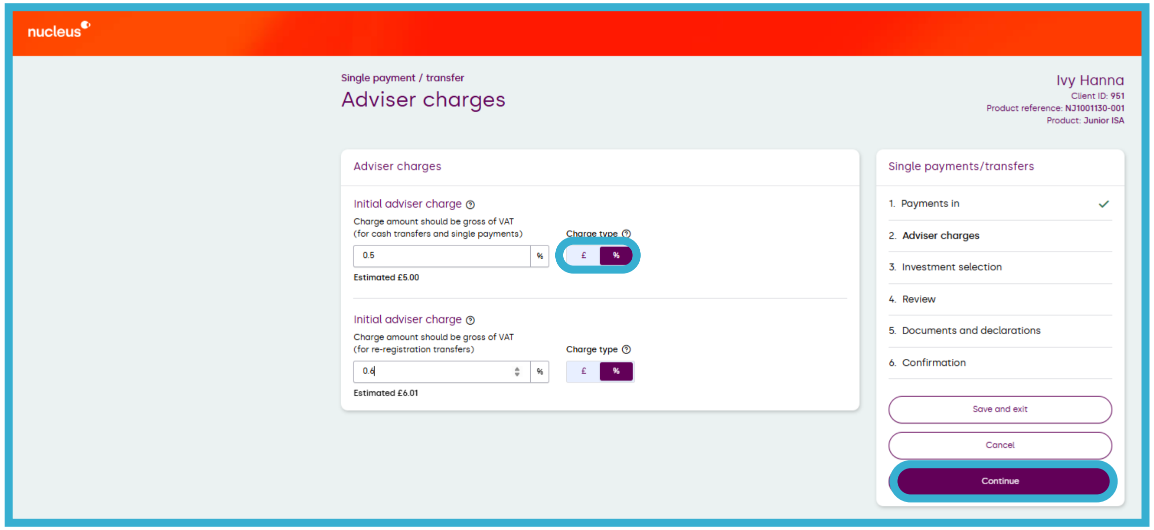
Once you're happy with your payment preferences, select '**Continue**' to move on to the adviser charges page.



Adviser charges

If you're applying for an initial adviser charge, please select '**£**' or '**%**' and enter the amount.

Estimated adviser charges will be visible during the application. Accurate charges will be deducted from the product upon completion of the top-up.



Key message

For more information about adviser charges, visit our website.

Once you're happy with your adviser charge preferences, select '**Continue**' to move on to the investment selection page.

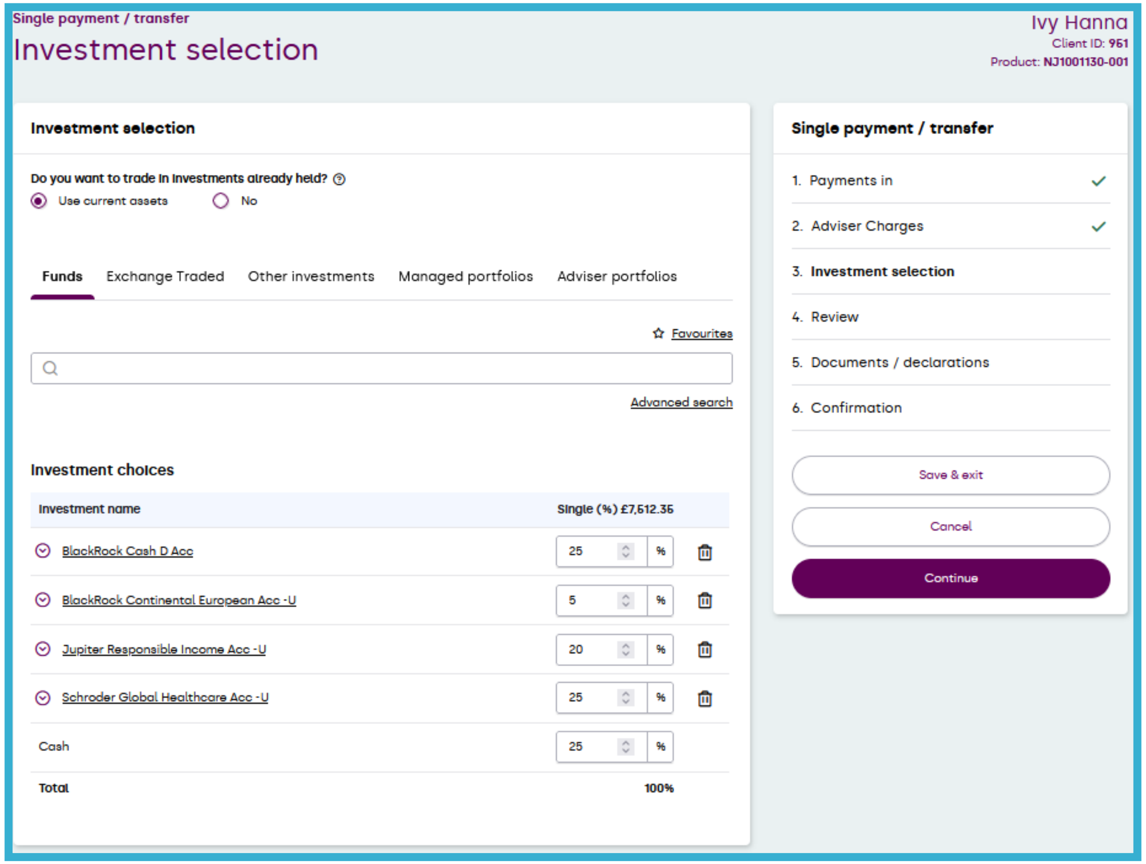
Investment selection

Confirm if the top up application will be invested into current or new assets.

Current assets

The current investment selection will appear at the bottom of the page.

Enter the percentage to be allocated to each investment. Ensure the totals entered equal 100%.

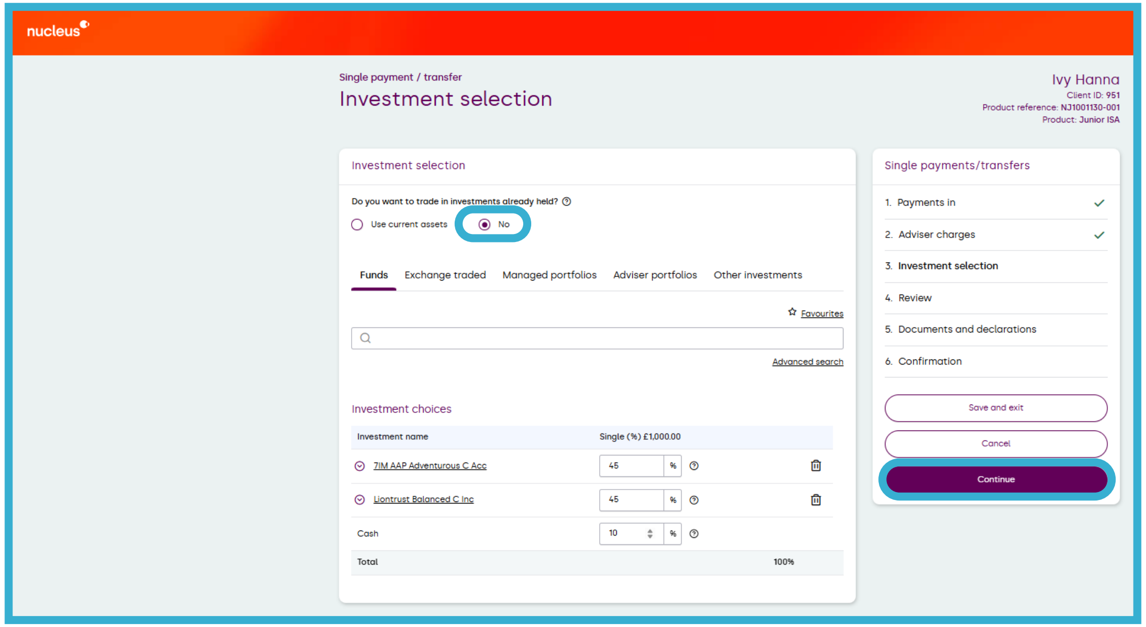


New assets

If you're investing into assets not currently held, select '**No**'.

Select the investment type across the headings shown here.

> Your client can now hold loose assets, multiple model portfolios, ETIs, and other investments, all within the same account. Investments will be purchased when the cash is available.



Enter the investment name into the search bar, then select the investment from the results.

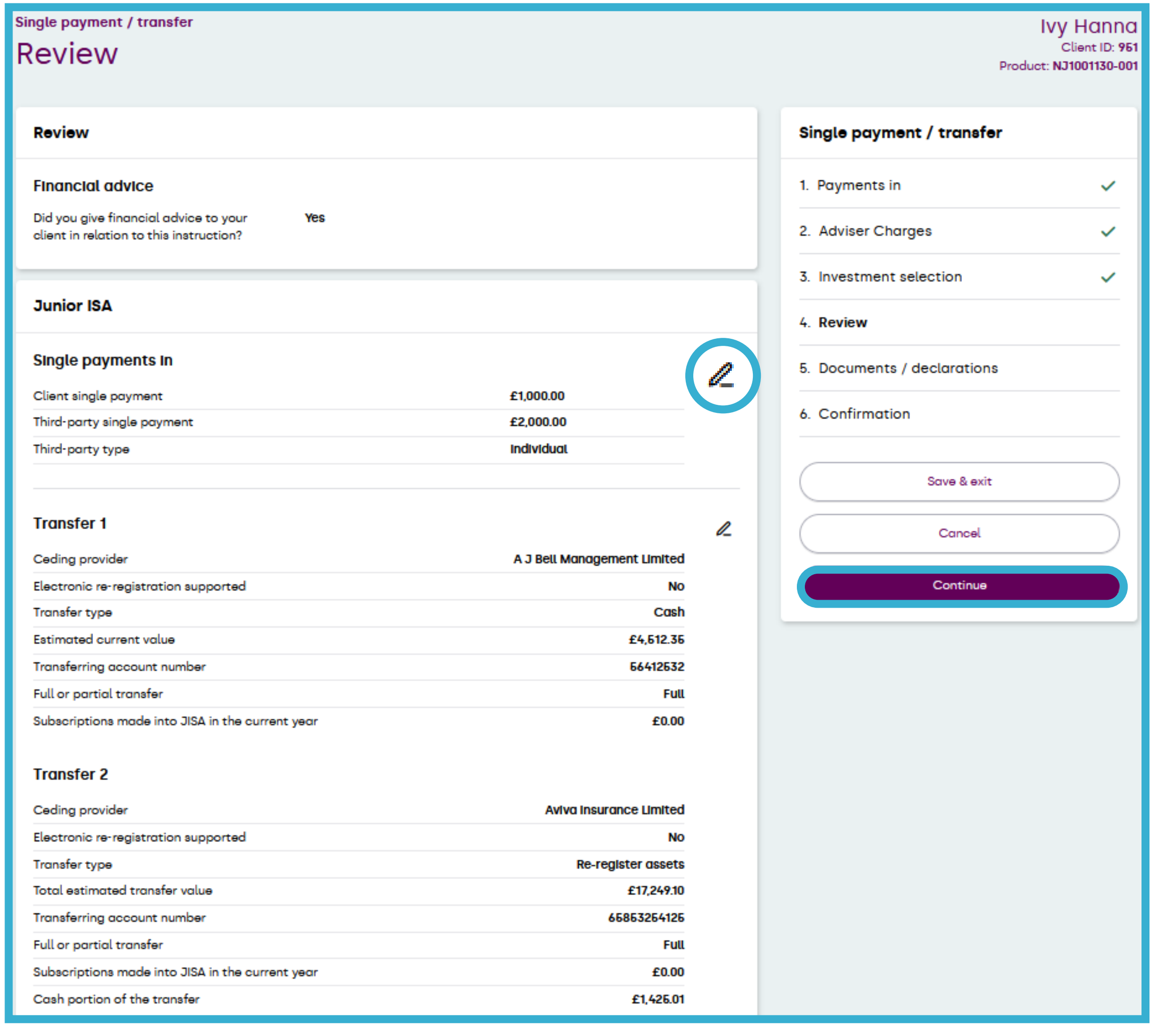
Enter a percentage amount for each investment choice. Investment choices must total 100%.

Once you're happy with your investment preferences, select '**Continue**' to move on to the review page.

Review

Review the details for accuracy. Use the '**pencil**' icon to make any necessary changes.

Once you're happy with the accuracy of the application, select '**Continue**' to move on to the declaration and documents page.



Declarations and documents

Wet signature is the only option that will be available for junior products.

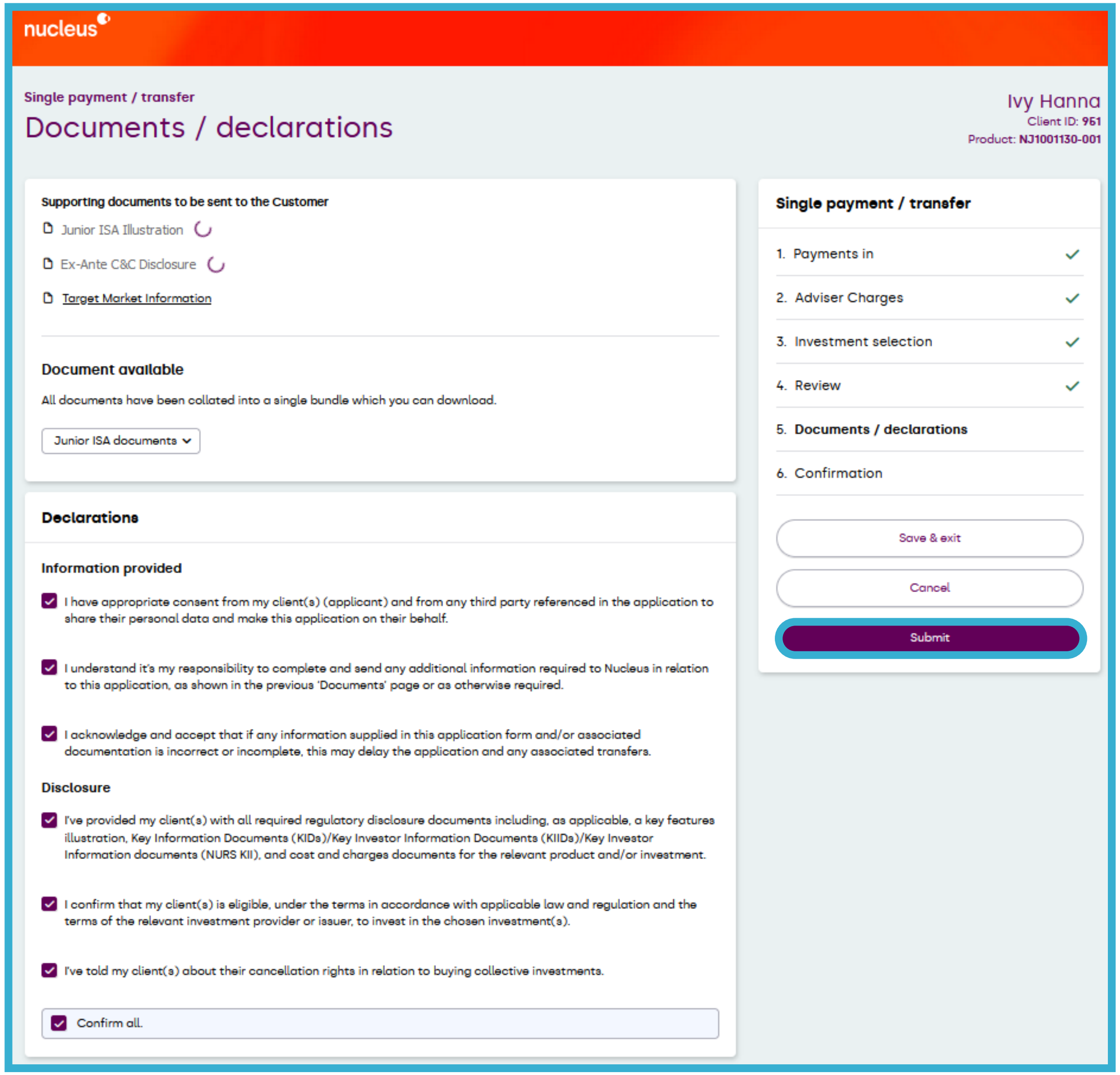
All relevant documents and illustrations will be produced here.

Documents will be available to download from the documents library.

Documents can't be amended once submitted. If there are any amendments to be made to documentation, you'll need to resubmit the application to generate new documents.

Read through the declarations and tick to confirm completion.

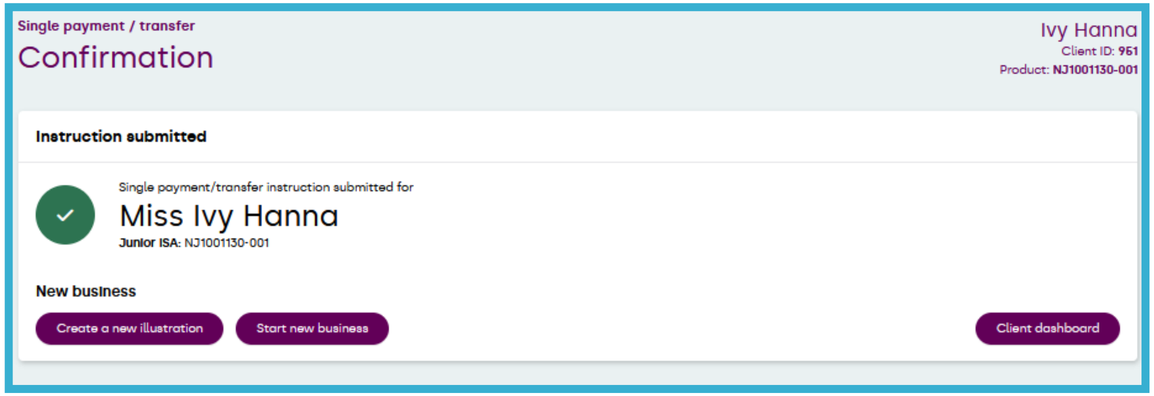
Select '**Submit**' to submit the top up application.



Confirmation

The top up application has been successfully submitted.

From here, you can create a new illustration, start a new business application or return to the account dashboard.



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