How to update your personal details

Here's what you need to do to update your personal details on your Nucleus account. It covers changing:

1. your name
2. your residential address or email address
3. your bank details
4. nomination of death benefits

1. Changing your name



To make sure that we protect you and your assets, before we can make any changes to your account or share any confidential information, we'll always speak to you first and take you through some security questions.

We'll never ask you to provide your full bank details during a call or ask you for any debit or credit card details.

There's a form we'll need you to complete and different ways we can get this to you, so the first step is to get in touch.

You can contact us by email or telephone to start the process.



Email client.contact@nucleusfinancial.com

If you email us, we'll ring you back as we'll need to ask you some questions to complete our security requirements and discuss your request.



Phone 0131 226 9535, Option 1

When you call us, again we'll run through some security questions before taking your instruction.

What we require

A change of name form (document reference 0649) to complete, sign and date

We also require an original or a certified copy* of the legal document which relates to the change such as your:

- marriage certificate
- change of name certificate
- divorce papers.

* Please see the end of this guide for details of how to certify documents.

Signing the form

We can only accept a handwritten signature, in ink.

Returning the form

You can post the form and your legal document to us at:



Mail Nucleus client relations, PO BOX 26968, Glasgow G2 9DY



Email Or return the form via email to client.contact@nucleusfinancial.com

What happens next?

When we've received your completed form, we need to speak to you to verify your instruction. We'll either call you or email you to ask you to call us.

During the call we'll run through some security questions before confirming your instruction. Once your instruction is verified, we'll update your name on your account within two working days. Your legal document will be returned via special delivery to the address we hold for you.

2. Changing your residential address or email address

The easiest way to update your address or email address is to call us on 0131 226 9535, option 1.

We'll run through some security questions with you, and all being well we'll update your address or email address during the call.

You can also write to us or email us with your request. When we receive your request we'll call you or ask you to call us - we need to ask you some questions to complete our security requirements before we can update your details.

3. Changing your bank details

If you'd like to add a new bank account or replace your existing bank account details, the new account must be in your name (either in your sole name or as a joint account holder). We can't accept a bank account in the name of a third party e.g. spouse, family member, power of attorney or solicitor.

There's a form we'll need you to complete and different ways we can get this to you, so the first step is to get in touch.

You can contact us by email or telephone to start the process.

Email client.contact@nucleusfinancial.com

If you email us, we'll ring you back as we'll need to ask you some questions to complete our security requirements and discuss your request.

Phone 0131 226 9535, Option 1

When you call us, again we'll run through some security questions before taking your instruction.

What we require

A change of bank details form (document reference 0842).

Signing the form

We can only accept a handwritten signature, in ink

Returning the form

Please post the form back to us at the following address:

Mail Nucleus client relations,
PO BOX 26968, Glasgow G2 9DY.

What happens next?

When we receive your completed form we'll need to speak to you to verify your instruction. We'll either call you or email you to ask you to call us.

During the call we'll run through some security questions before confirming your instruction. Once your instruction is verified, we'll update your bank details on your account within two working days.

4. Nomination of death benefits (also known as expression of wishes)

If you'd like to add to or change the potential beneficiaries nominated for your pension account there's a form we'll need you to complete and different ways we can get this to you, so the first step is to get in touch.

You can contact us by email or telephone to start the process.

Email client.contact@nucleusfinancial.com

If you email us, we'll ring you back as we'll need to ask you some questions to complete our security requirements and discuss your request.

Phone 0131 226 9535, Option 1

When you call us, again we'll run through some security questions before taking your instruction.

What we require

We'll send you a nomination of death benefits form for you to complete, sign and date.

Signing the form

We can only accept a handwritten signature, in ink

Returning the form

You can send the completed form back to us either by email, or in the post.

Email Return the form via email to client.contact@nucleusfinancial.com

Mail Post the forms to us at Nucleus client relations, PO BOX 26968, Glasgow G2 9DY.

What happens next?

When we receive your completed form, we'll need to speak to you to verify your instruction. We'll either call you or email you to ask you to call us.

During the call we'll run through some security questions before confirming your instruction. Once your instruction is verified, we 'll update the pension beneficiary details on your account within two working days.

In the event of your death, we'll consider your nominated beneficiaries when settling any pension death benefits.

Please note that because we operate a trust-based pension scheme we have discretion over the settlement of death benefits, however we'll always take your wishes into account

Certifying documents

If you haven't sent us an original legal document, any copies must be certified as a true copy of the original and the name of the person certifying must be clearly and legibly printed.

The capacity under which the suitable certifier is signing must be provided. All documents must be certified once, with an original wet signature. The signature should also be dated.

Suitable certifiers

- An authorised representative of an embassy or consulate of the country who issued the identification document.
- A notary public.
- A commissioner for oaths.
- A lawyer or advocate.
- A formally appointed member of the judiciary.
- A registrar or other civil or public servant authorised to issue or certify copy documents.
- An FCA authorised financial adviser.

We can't accept a certified copy of a certified copy – the certified copy must be based on the original document.

Example certification

I hereby certify this to be a true copy of the original.

Signed by: *Adam Smith* Dated: 28 March 2024

ADAM SMITH, Financial Adviser, ABC Adviser Company Limited

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 client.relations@nucleusfinancial.com www.nucleusfinancial.com

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