For advisers

Our **new** platform

nucleus platform

How to edit a non-SIPP regular payment

3 minute read

How to edit a non-SIPP regular payment

How to use this document

Important information will look like this.

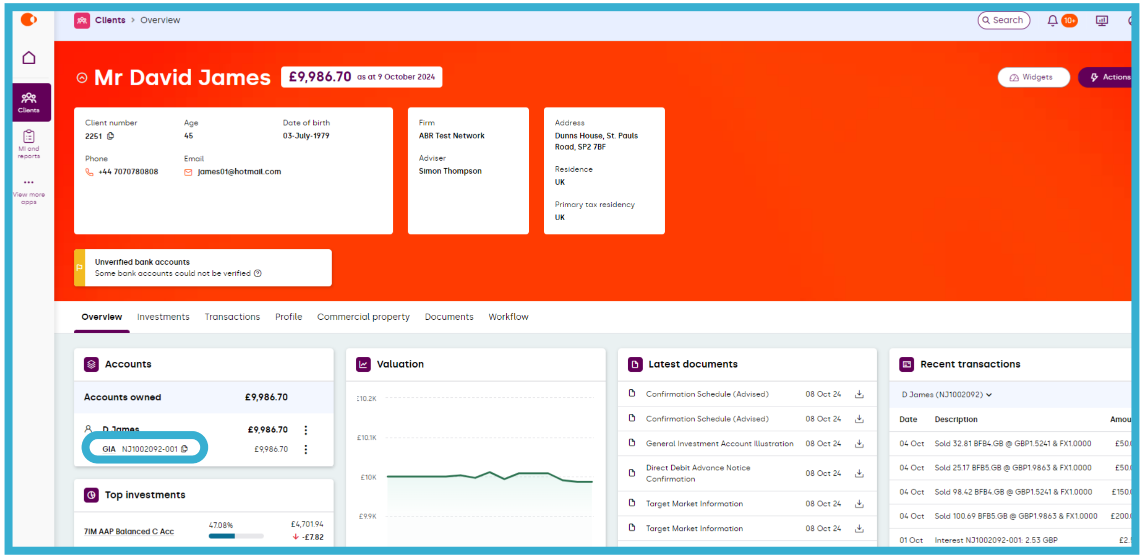
Key messages

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 edit a non-SIPP regular payment



> **!** To start editing a non-SIPP regular payment, 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.

Once you've located your client, you can refer to this guide to edit the regular payment.

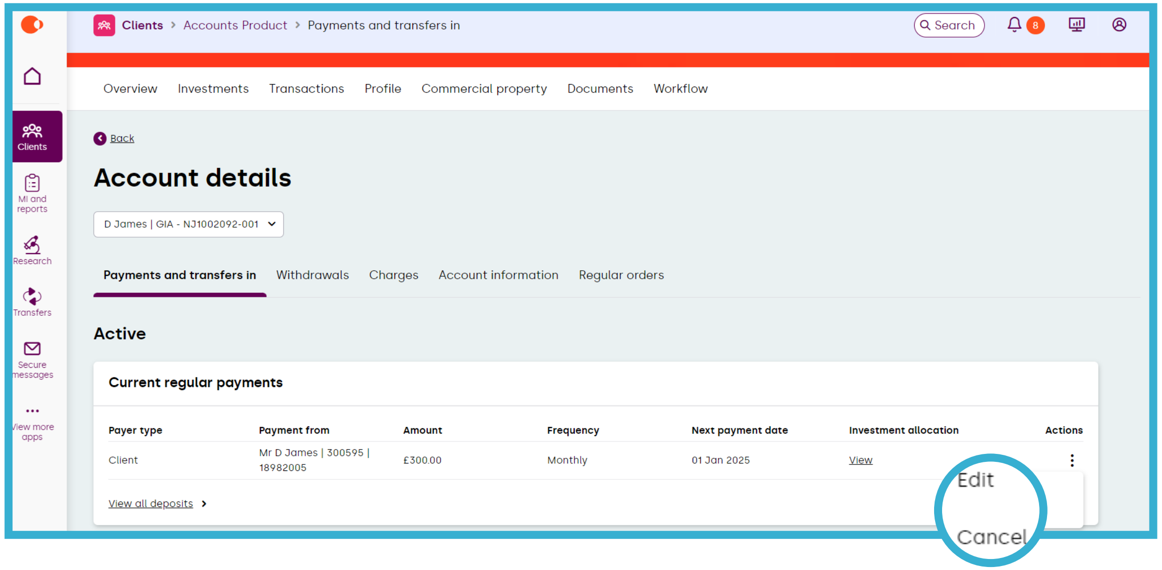
> **!** Your client must have an existing active regular payment to proceed.

> **!** You'll not be able to view or add third party and employer bank accounts.

From the client landing page select the account, by selecting the product name e.g. in this example '**GIA**'.

All current regular payments will appear on the screen.

Select the vertical ellipses (three dots) under actions on the regular payment you wish to edit or cancel, then select '**Edit**' or '**Cancel**'.



Editing a regular payment

> **!** When editing a regular payment the existing payment will be cancelled.

Confirm if advice has been given to your client.

Enter the regular payment details that require amending.

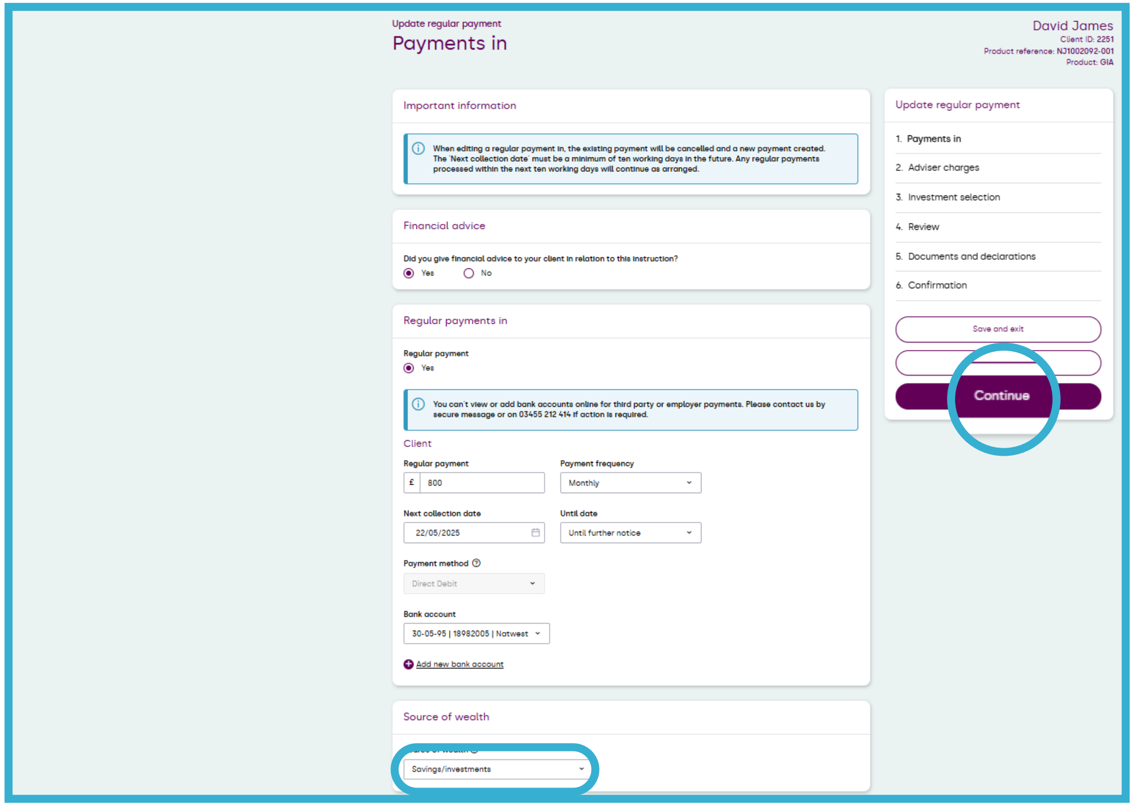
> **!** The collection date can be any date from 1 - 28 of the month.
>
> Please note, there's a minimum of 10 working days required to set up the Direct Debit instruction.

Select the bank account.

> The bank account will be pre-populated if your client only has one authorised nominated bank account.

Select source of wealth from drop-down list.

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

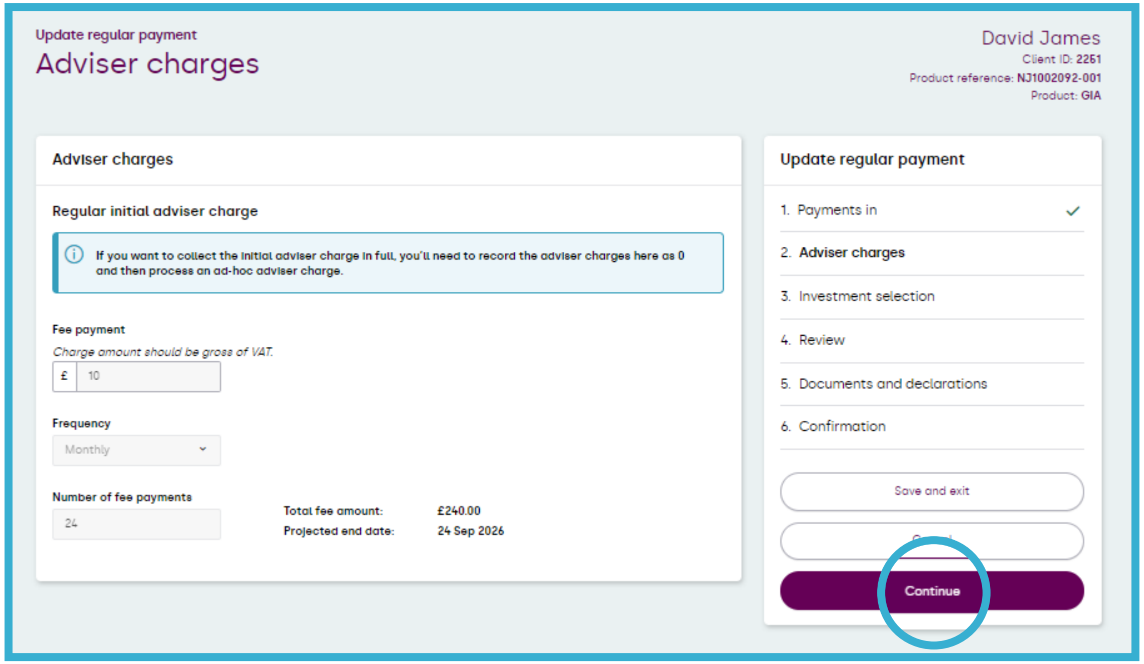


Adviser charges

Adviser charges are pre-populated and can't be amended.

For more information about adviser charges, please visit our website.

Select '**Continue**' to move on to the investment selection page.



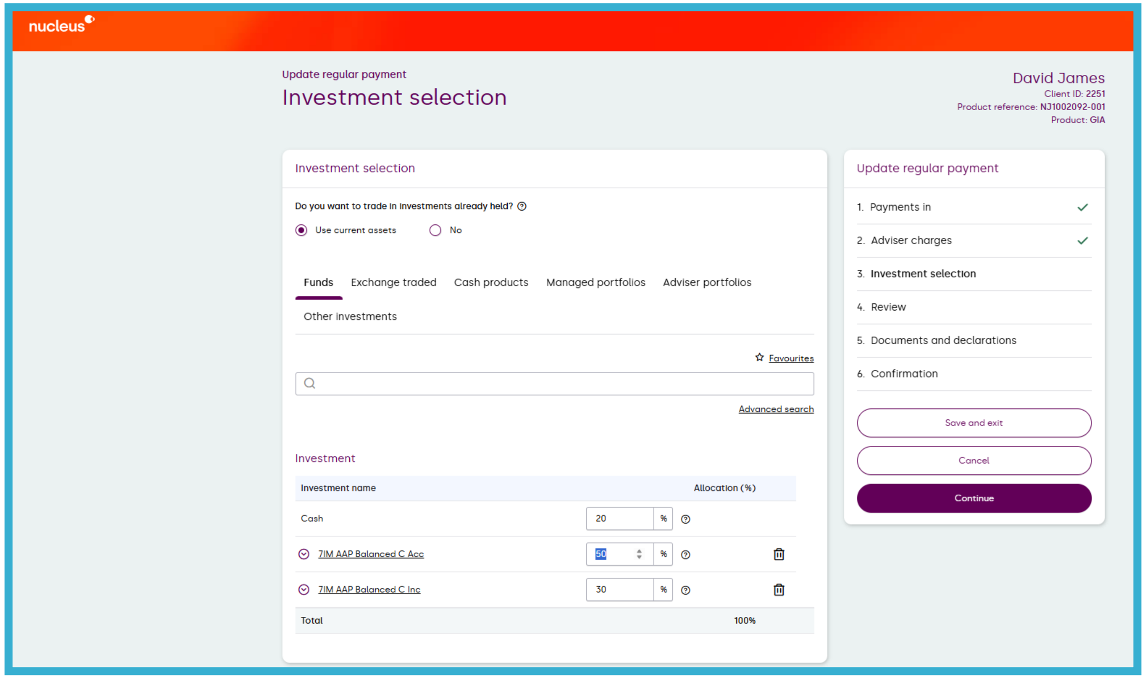
Investment selection

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.

Add in 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**'.

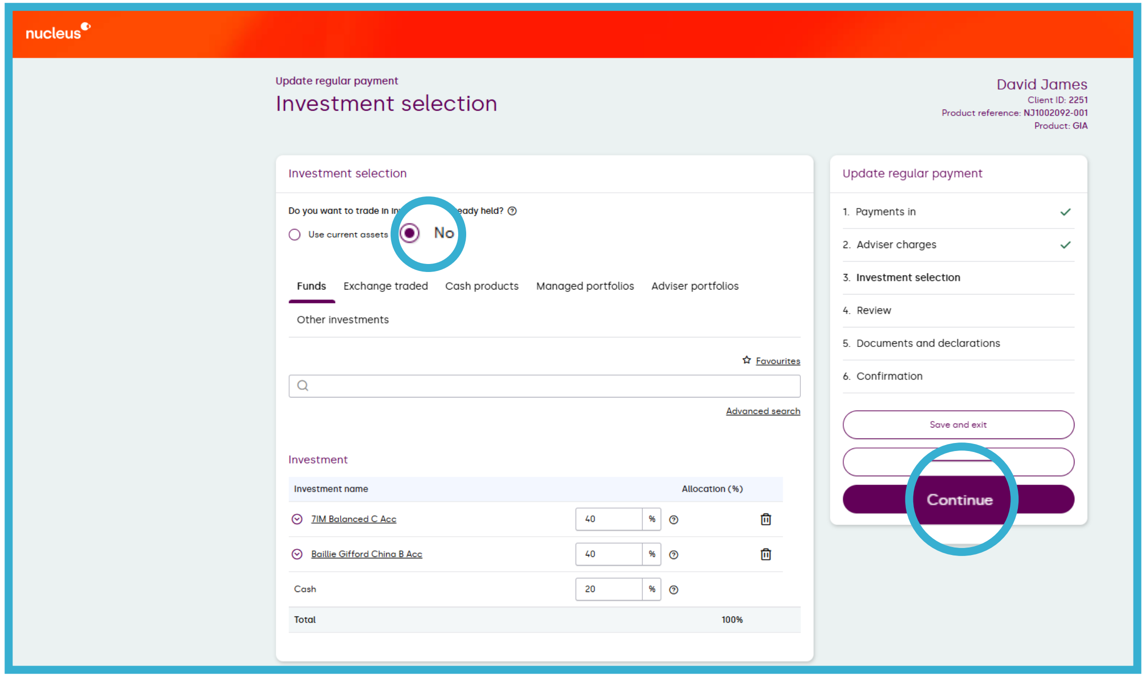
Select the investment type across the headings shown here.

Enter the investment name into the search bar and select the investment from the results.

> 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 a percentage for each investment choice. Ensuring the totals equals 100%.

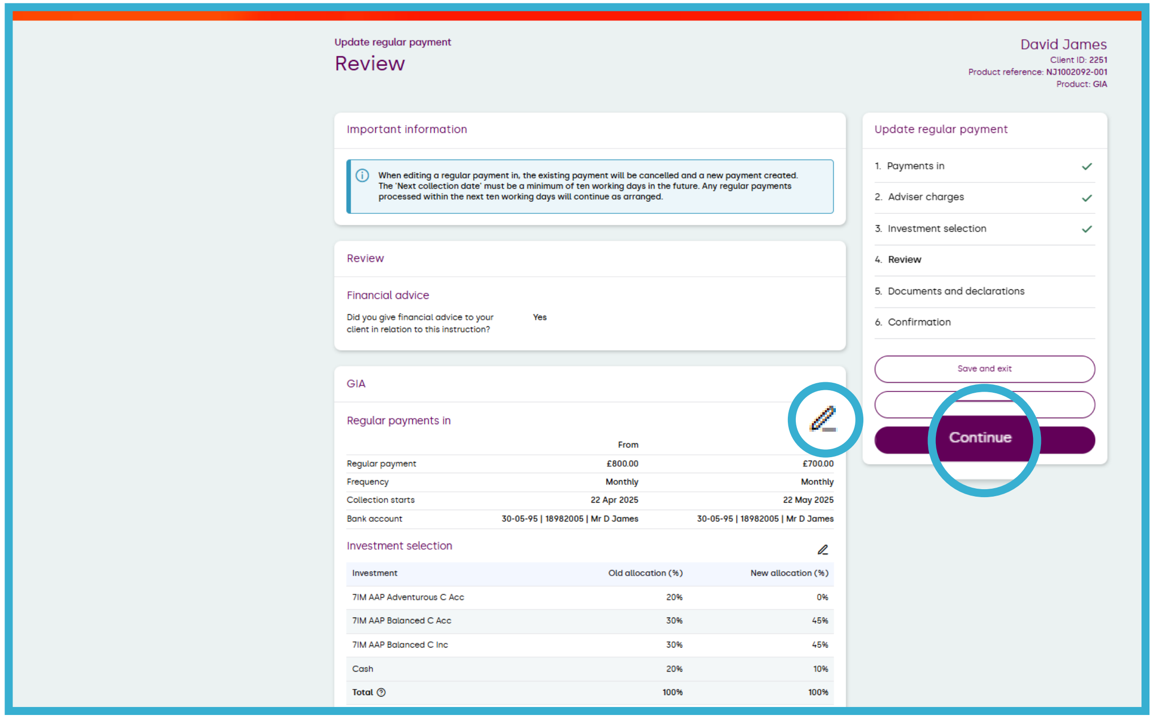
Once you're happy with your investment preferences, select '**Continue**' to move on to the review page.



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.



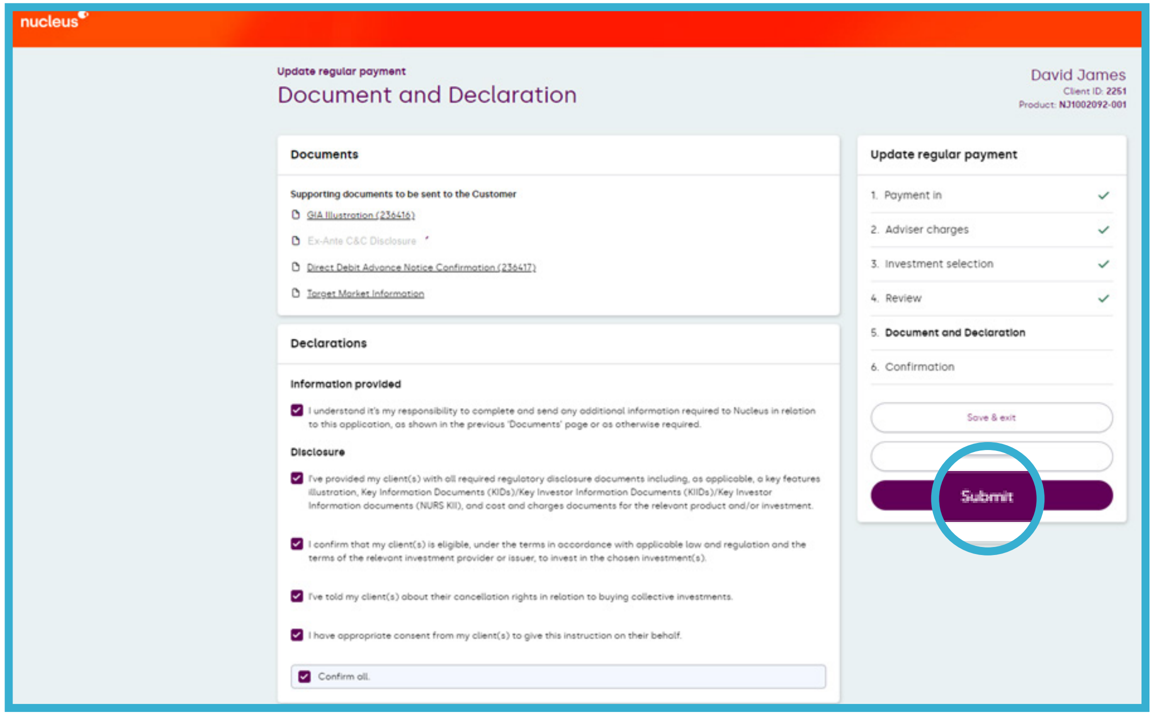
Declarations and documents

All relevant documents and illustrations will be produced here.

Documents will be available to download within the documents library.

Please read through the declarations and tick to confirm completion.

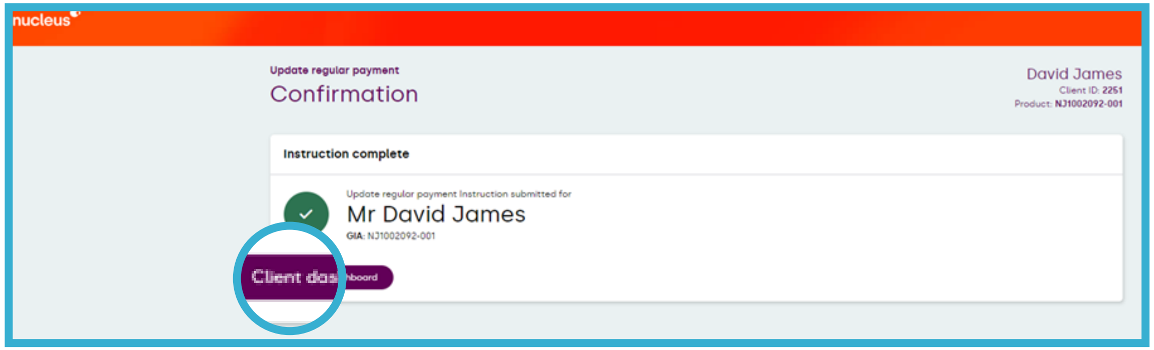
Select '**Submit**' to submit the changes.



Confirmation

The new regular payment has been submitted.

You can select '**Client dashboard**' to return to the client's home page.



If the original regular payment was set up prior to the platform upgrade, please review the original buy instruction as this process may duplicate the buy. For information on how to do this, please see our 'How to edit and cancel a regular buy and sell' guide.

How to cancel a non-SIPP regular payment

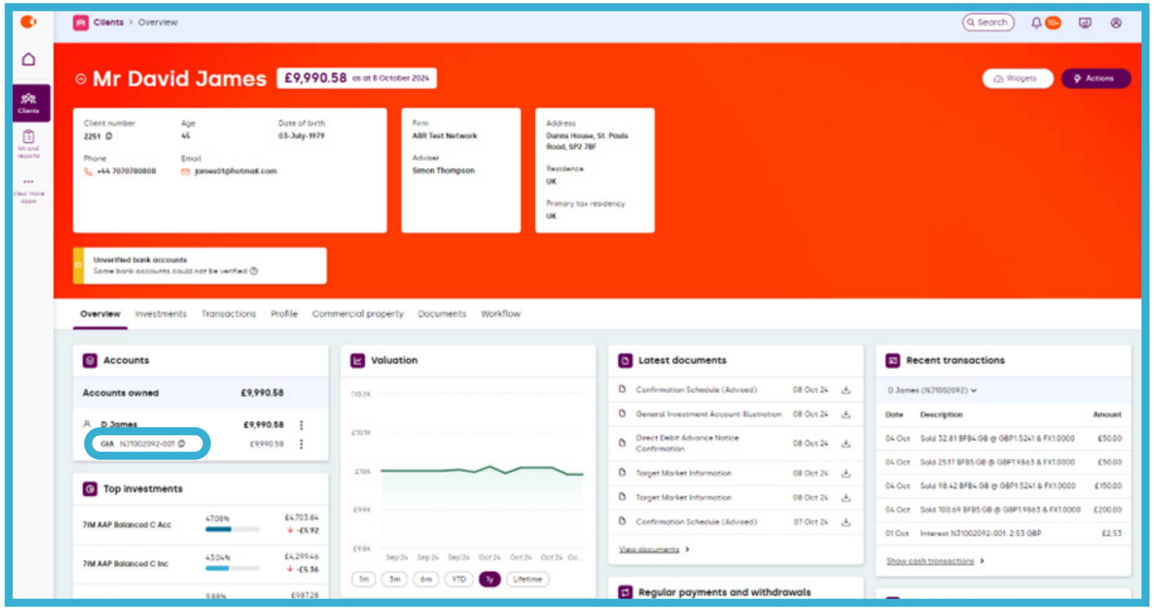
To cancel the regular payment, you first need to find your client. Please refer to the guides on our website to search for a client or create a new client.

Once you've located your client, you can refer to this guide to cancel the regular payment.

Your client must have an existing active regular payment to proceed.

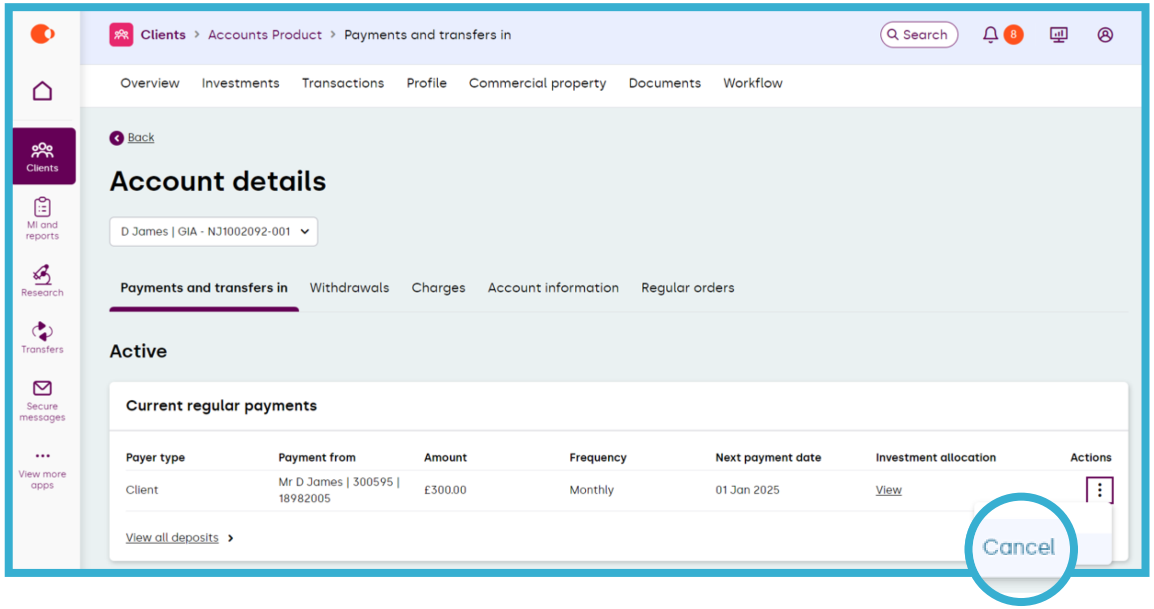
Any payments scheduled in the next eight business days will still be collected.

From the client home page select the account, by selecting the product name e.g. in this example '**GIA**'.



All current regular payments will appear on the screen.

Select the vertical ellipses (three dots) under actions on the regular payment you wish to cancel, then select '**Cancel**'.



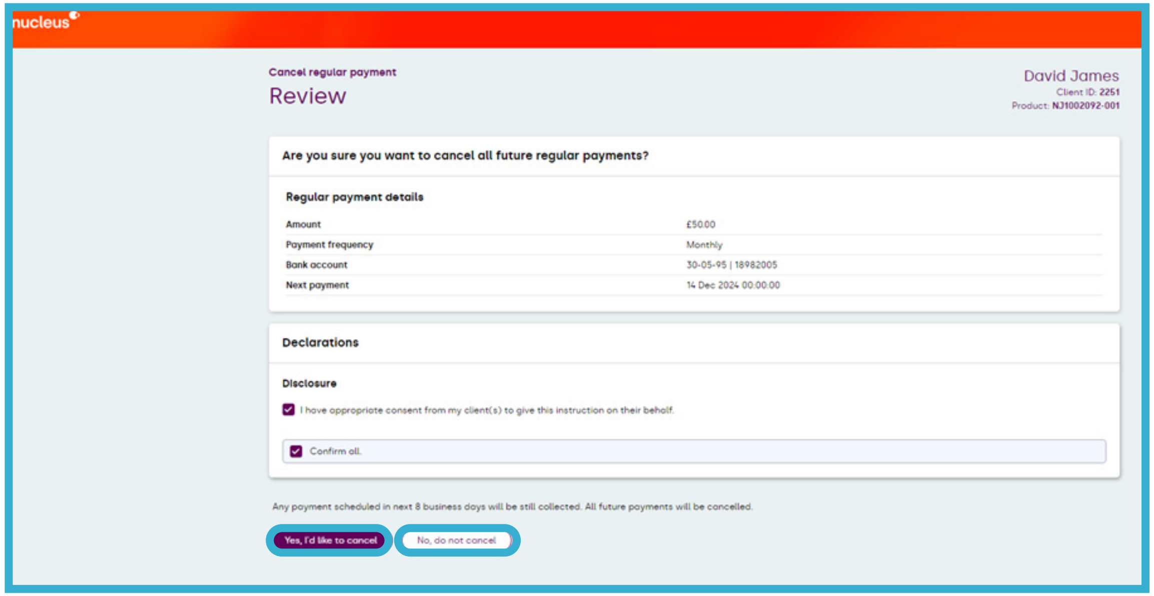
Review

Review the details to ensure you're cancelling the correct regular payment.

Please read through the declaration and tick to confirm completion.

Select '**Yes, I'd like to cancel**' to submit the cancelation.

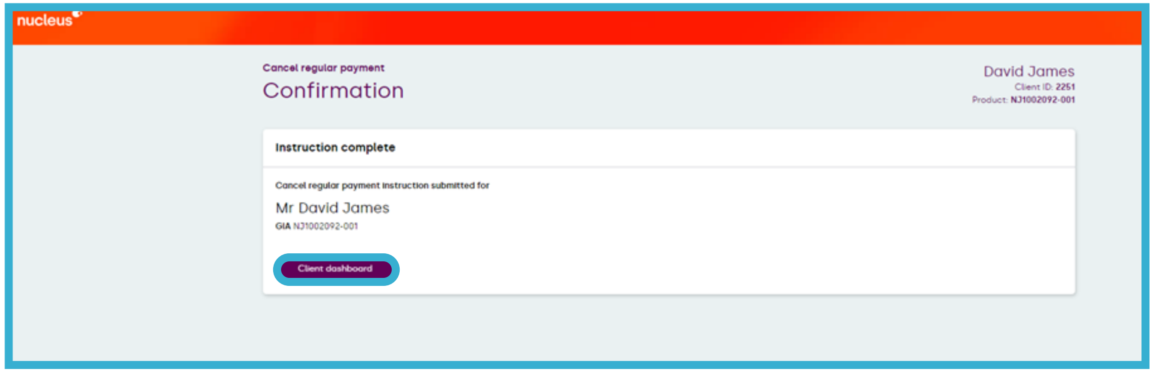
Select '**No, do not cancel**' to return to your client account.



Confirmation

The regular payment has been submitted.

You can select '**Client dashboard**' to return to the client's home page.



If the original regular payment was set up prior to the platform upgrade, please review the original buy instruction as the purchase may remain active. For information on how to do this, please see our 'How to edit and cancel a regular buy and sell' guide.

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For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.

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02/2026