

Easy steps to transferring into a Nucleus Isa

Bringing together your client's investments offers a number of benefits including a single valuation for all their holdings, improved reporting, a single view of all their investments and use of a consistent investment range and tools. Here's how to do it.

- 1 Add the client to the platform, or choose an existing client.
- 2 Select 'top up/add investment'.
- 3 Select account type 'Isa' for new accounts or the existing Isa account you wish to top up.
- 4 Select 're-register' or 'transfer' as the 'contribution type' and the annual advice fee (if topping up the annual advice fee for the account will be displayed).

If instructing a re-registration and residual cash is included, please remember to key a transfer for the cash element.

- 5 Select the ceding company from the dropdown menu and input the policy details being transferred and the initial fee to be deducted (cash transfer only).

Please note this is the address we'll send the request to and the contact details we'll use to chase the transfer, so please make sure these details are accurate. When keying a re-registration, please ensure the ISIN codes and unit amounts are accurate and match a recent valuation from the ceding scheme to avoid delays. The 'Funds' report on the platform can be used to check if we hold assets prior to keying.

If the ceding company is not on the dropdown list, select 'other' then manually enter the company name and address. Please note that this is the address we'll send the transfer request to and the details we'll use to chase the transfer, so please make sure these details are accurate.

- 6 Select the assets.

You can use a model portfolio, select individual assets or choose from your 'favourite assets' list. To set up a model portfolio, please see the [Model portfolios user guide \(0319\)](#).

- 7 Submit the application.

At this stage you can illustrate (cash transfer only) and review the application input for accuracy.

- 8 Print the system generated, pre-populated forms and send to Nucleus client relations via Jira Messaging.

The 'i' button will tell you what these are. Remember to include a copy of the application summary which is printed separately.



More information

For more details please see the video guide [How to transfer into a Nucleus Isa](#) and our [Cash and re-registration transfers guide \(0582\)](#). See our ['Sending payments to Nucleus, a guide for clients \(0618\)'](#) a handy one pager which details our bank account information that you can pass onto your clients.

For help on how to add a client, please refer to the [New clients and new business user guide \(0061\)](#).

We accept electronic signatures for new business and client instructions. Take a look at our [e-signatures guide \(0331\)](#).

We can accept scanned documentation via Jira messaging. Please see our [scanned documentation guide \(0534\)](#) for more details.

For help with keying a transfer please call your Client Relations Manager or you can speak to us on Live Chat.

Analysing your clients

Use the 'Isa contributions' report (available from the ['Reports'](#) tab) to view your clients' current Isa allocation status.