Change to annual advice fee

All account holders must sign this form.

Please complete and sign this form before sending it to us at the address below or via Jira messaging. If you've any questions please contact your Nucleus client relations manager who'll be delighted to help.

0131 226 9535 client.relations@nucleusfinancial.com Nucleus Client Relations, PO Box 26968, Glasgow G2 9DY

If anyone forgets to add a date to their signature, we'll treat the day we receive this form as the signing date.

Name(s)

I hereby authorise Nucleus to apply an annual adviser charge on the following account(s)

Complete one of these columns per account

Account e.g. General, Isa	Account number	Fee (expressed as a %)	Total annual flat fee amount (£)
	N		
	N		
	N		
	N		
	N		
	N		
	N		

If you have agreed to pay ongoing adviser charges on a flat fee basis, please note:

Charges accrue daily and are calculated using an annual rate, so the amount deducted each month may vary depending on the number of days in that period. As a result, the monthly payment may be slightly higher or lower than expected.

Effective date (please tick one box)

☐ The fee should be effective from the date of processing or ☐ The fee should be backdated to the 1st of the current month

Authorisation

Client/First trustee signature

Print name

Date (dd-mm-yyyy)

– –

Joint holder/Second trustee signature

Print name

Date (dd-mm-yyyy)

– –

Third trustee signature

Print name

Date (dd-mm-yyyy)

– –

Fourth trustee signature

Print name

Date (dd-mm-yyyy)

– –

Note: all individual trustees must sign so if there are more than four please photo copy this page and delete the trustee numbers and replace as necessary.

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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