

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.

Names(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		

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*

*If changing between a % and flat fee, this must be backdated to the 1st of the 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 Tynetalk service on 18001 0131 226 9535.



0131 226 9535



client.relations@nucleusfinancial.com



www.nucleusfinancial.com

Nucleus, *NFS* and *Nucleus Financial Services* are the trading names of Nucleus Financial Services Limited (NFS) (registered in England number 05629686); Nucleus Financial Limited (NF) (registered in England number 05522098); Nucleus Trustee Company Limited (NTC) (registered in Scotland number SC312652); and NFS (Nominees) Limited (NFSN) (registered in England number 07621355). NFS, NF and NFSN have their registered office at Suite B & C, First Floor, Milford House, 43-55 Milford Street, Salisbury, SP1 2BP. NTC has its registered office at 12 Blenheim Place, Edinburgh EH7 5JH. NFS is authorised and regulated by the Financial Conduct Authority. NFS and NF are members of a VAT group with VAT registration number 514 0358 80. NFS, NF, NTC and NFSN are all wholly owned subsidiaries of Nucleus Financial Platforms Limited (registered in England, number 06033126) whose registered office is at Suite B & C, First Floor, Milford House, 43-55 Milford Street, Salisbury, SP1 2BP. All companies are members of the Nucleus Group. Further details of the Nucleus Group can be found at nucleusfinancial.com. (12/24)