

Inter account transfer – client authority

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

Please complete and sign before posting to us at the address above or by attaching to a Jira. This instruction must be signed by the gifting account holder(s) and submitted before the transfer of monies can be actioned. If any party signs but fails to date a signature, the date that we receive this form will be deemed to be the date that the signing party signed this agreement.

Please note a delay in receiving this form will result in the delay in the application of monies. If you've any questions please contact a member of the client relations team who'll be delighted to help.

This form is only to be completed when both clients are account holders on the platform e.g. husband to wife. Please make sure you complete the online top-up process for transfers between an individual's accounts e.g. General to Isa.

Transfer from

Client name(s)

Account number

N

Amount

£

Or 100% full transfer and account closure

Transfer to

Client name(s)

Account number

N

To make sure that the inter account transfer is processed efficiently please confirm the relationship between the ceding and receiving accounts:

Please tick as required

Client's own account

Spouse/civil partner

Child

Trust account

Other*

* If other has been selected please confirm the relationship between the clients and the reason for the IAT.

Authorisation – to be signed by the client(s)

I/We hereby authorise Nucleus to transfer the above cash from my/our account.

Client signature

Date

Print name

Joint signature

Date

Print name

Or

Signed by the adviser on behalf of the client - **the maximum value that can be signed for is £20,000.**

I can confirm that I've received an instruction from the client requesting this course of action.

Date

Signature