Nucleus Onshore Bond account top-up form

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

Please complete this form and send it to us at the address above. If you've any questions please contact us on 0131 226 9535 or client.relations@nucleusfinancial.com and we'll be delighted to help.

The Nucleus Onshore Bond account is provided by Countrywide Assured plc and they require information in order to accept new investments. This top-up form must be completed and submitted with any new investment. If this is not received it will cause a delay in the investment of any new monies.

Name(s)

Nucleus account number

N

Additional investment

£

Initial fee payable

£/%

Source of funds

Please provide details of the bank/building society account used to make your investment. If your investment is being provided by a bank or building society transfer/cheque, please provide details of the personal account/other investment from which the money was drawn.

Bank account name

Sort code

Account/Roll number

Bank/Building society address

Postcode

Where funds are coming from an existing General account

N

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What is the source of wealth in relation to your investment?

This section only applies to the applicants/trustees funding the investment.

Please tick all boxes that may apply

Source	1st or sole applicant/trustee	2nd applicant/ trustee	3rd trustee	4th trustee
Accumulated savings from employment				
Retirement fund				
Inheritance				
Sale of property/asset				
Company sale				
Sale/maturity of existing investments				
Gift				
Divorce settlement				
Compensation payment				
Lottery or betting win				

Please note that any other source of investment not listed must be approved before the top-up is submitted.

Trustee/applicant details

First trustee/applicant

Title, surname and forename(s) in full

*Annual income band (please tick)

£0-£14,999 £15,000-£29,999 £30,000-£59,999

£60,000-£99,999 £100,000-£149,999 £150,000+

Second trustee/applicant

Title, surname and forename(s) in full

*Annual income band (please tick)

£0-£14,999 £15,000-£29,999 £30,000-£59,999

£60,000-£99,999 £100,000-£149,999 £150,000+

* Annual income band is only required to be completed if the trustee(s)/applicant(s) is/are funding the investment.

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Third trustee/applicant

Title, surname and forename(s) in full

*Annual income band (please tick)

£0-£14,999 £15,000-£29,999 £30,000-£59,999

£60,000-£99,999 £100,000-£149,999 £150,000+

Fourth trustee/applicant

Title, surname and forename(s) in full

*Annual income band (please tick)

£0-£14,999 £15,000-£29,999 £30,000-£59,999

£60,000-£99,999 £100,000-£149,999 £150,000+

* Annual income band is only required to be completed if the trustee(s)/applicant(s) is/are funding the investment.

Fees

Declaration

- To the best of my /our * knowledge and belief all of the statements I /we * have given are true and complete and, together with the Nucleus terms and conditions and Policy schedule, will form the basis of the contract between me /us *, Nucleus Financial Services Limited and Countrywide Assured plc.
- I /We * have read and understood the product literature, the key features of the Nucleus Onshore Bond account and accompanying illustration.
- I /We * hereby authorise Nucleus to pay my adviser the above fee on my /our * additional investment.

*Please select as applicable

Signatures

Signature of first/sole applicant/trustee

Print name

Date

Signature of second applicant/trustee

Print name

Date

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Signature of third applicant/trustee

Signature of fourth applicant/trustee

Print name

Print name

Date

Date

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0131 226 9535, or via the Typetalk service on 18001 0131 226 9535.

0131 226 9535 client.relations@nucleusfinancial.com nucleusfinancial.com

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