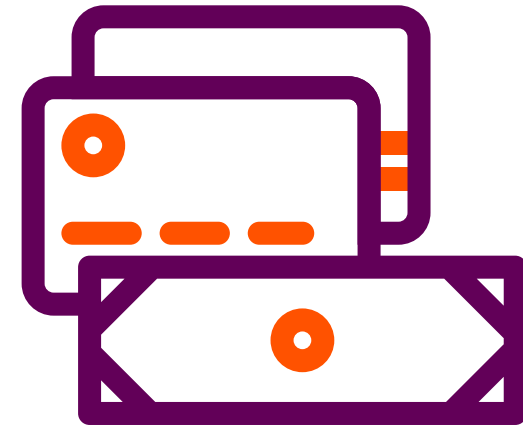


For customers

Our new
platform

nucleus^o platform

How to make a regular withdrawal



🕒 2 minute read

How to make a regular withdrawal

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How to use this document



Important information will look like this.

Key messages

Key messages will look like this.



Useful info will look like this.



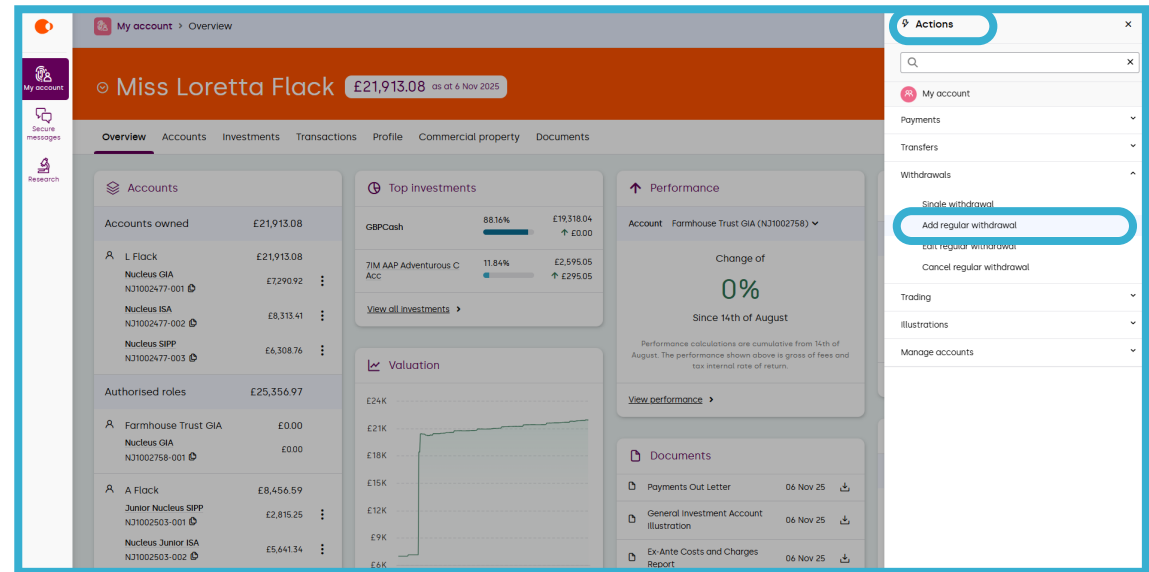
We recommend using the zoom function to view the details on the platform screens in this guide.

How to make a regular withdrawal

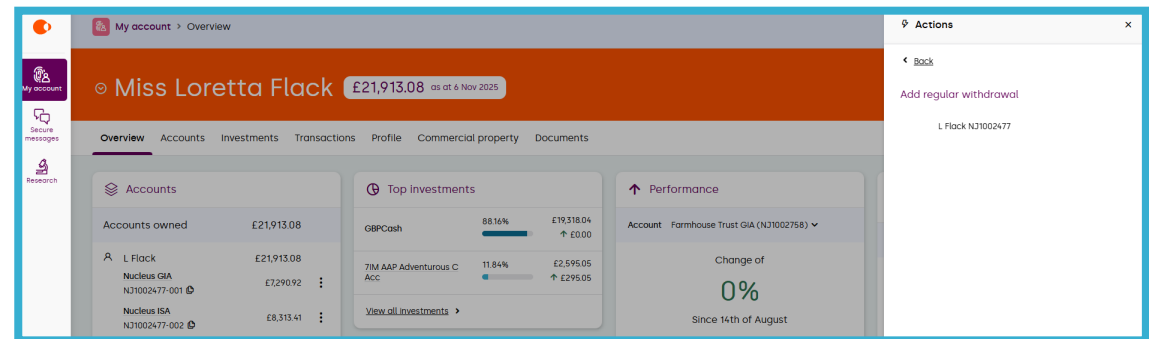
This process is the same for both a GIA and ISA. This guide follows the steps for an ISA product

Once logged into your account, you'll arrive at your overview page.

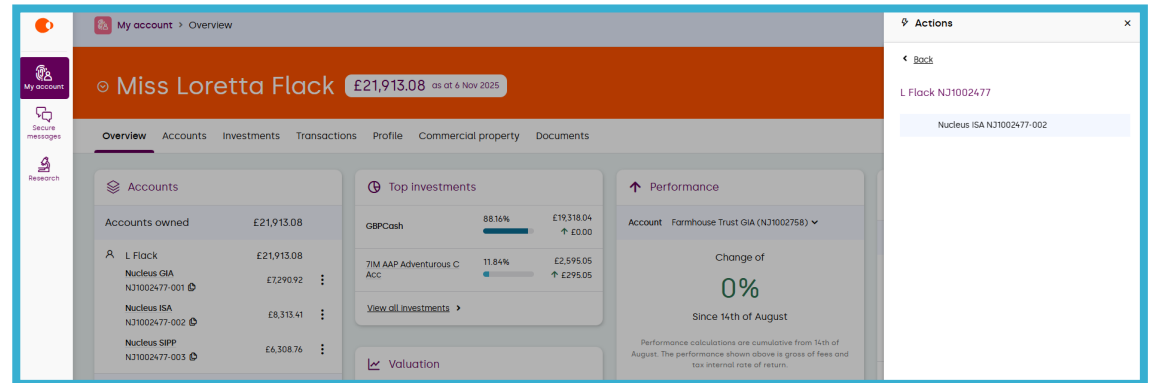
To add a regular withdrawal, select the **'Actions'** button in the top righthand corner of the screen. Then select **'Add regular withdrawal'**.



Select the account to make the withdrawal from.



Then select the product you'd like to withdraw funds from.



Withdrawal details

Add the '**Withdrawal amount**', '**Frequency**' and '**First withdrawal date**'.

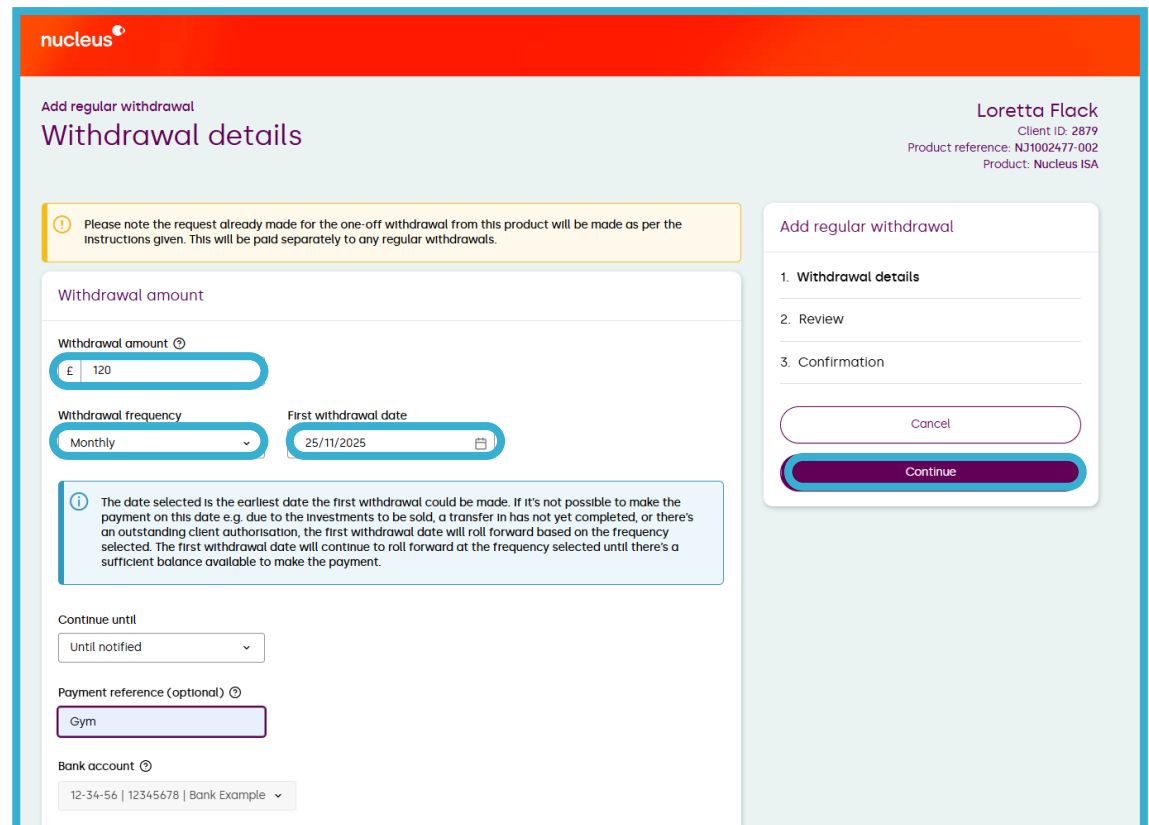
Add a date if you want the regular withdrawal to have an expiry date.

Add a payment reference if required.

Check the bank account is correct.



You can add an additional bank account back on your overview page, under the '**Profile**' tab, and then select '**Bank accounts**'.



Confirm where the funds will be withdrawn from, either available cash and/or current assets.

Then select '**Continue**'.

Continue until
Until notified

Payment reference (optional) ⓘ
Gym

Bank account ⓘ
12-34-56 | 12345678 | Bank Example

Investments to sell

Withdrawal amount Monthly
£120.00

Investment name	Available to sell	Estimated amount to withdraw ⓘ	Sell all ⓘ
Cash	£541.87	£ 0	<input type="checkbox"/>
ZIM AAP Adventurous C Acc	£2,256.54	£ 0120	<input type="checkbox"/>
Total		£120.00	

Cancel

Continue

Review

Review the withdrawal details for accuracy. You can make any changes using the 'pencil' icons.

You can download the ISA Illustration for information purposes.

The screenshot shows the 'Review' stage of adding a regular withdrawal to a Nucleus ISA. The page is titled 'Add regular withdrawal' and 'Review'. Client details for Loretta Flack are shown in the top right. The main content is divided into three sections: 'Regular withdrawal', 'Investments to sell', and 'Supporting documents'. The 'Regular withdrawal' section contains a table with details like amount (£120.00), frequency (Monthly), and first date (15 Jan 2026). The 'Investments to sell' section shows a table with one investment, '7IM AAP Adventurous C Acc', with a regular withdrawal allocation of £120.00. The 'Supporting documents' section has a link to 'ISA Illustration'. On the right, a progress bar shows three steps: '1. Withdrawal details' (checked), '2. Review' (current), and '3. Confirmation'. Below the progress bar are 'Cancel' and 'Submit' buttons.

nucleus

Add regular withdrawal

Review

Loretta Flack
Client ID: 2879
Product reference: NJ1002477-002
Product: Nucleus ISA

Nucleus ISA

Regular withdrawal

Withdrawal amount	£120.00
Withdrawal frequency	Monthly
First withdrawal date	15 Jan 2026
Continue until	Until notified
Reference	Gym
Bank account	12-34-56 12345678 Miss L Flack

Investments to sell

Investment	Regular withdrawal allocation
7IM AAP Adventurous C Acc	£120.00
Estimated net order value	£120.00

Supporting documents

[ISA Illustration](#)

Add regular withdrawal

1. Withdrawal details ✓
2. **Review**
3. Confirmation

Cancel

Submit

Read the declaration and tick to confirm.


Then select **'Submit'** to complete the regular withdrawal application.

The screenshot shows a 'Declarations' section with a sub-section for 'Investments'. It contains a checked checkbox for the statement: 'I authorise Nucleus and its agents to deal directly with the providers and issuers of investments held and their agents in order to carry out my investment instructions.' Below this is a 'Confirm all' button, also with a checked checkbox.


Confirmation

A confirmation message will appear to indicate that your regular withdrawal has been submitted.

The screenshot shows a confirmation page with a red header containing the 'nucleus' logo. The page title is 'Add regular withdrawal Confirmation'. On the right, it displays the user's name 'Loretta Flack', 'Client ID: 2879', 'Product reference: NJ1002477-002', and 'Product: Nucleus ISA'. The main content area shows 'Instruction complete' with a green checkmark icon and the message: 'Your regular withdrawal instruction has been submitted'. Below this, the name 'Miss Loretta Flack' and 'Nucleus ISA: NJ1002477-002' are displayed. A 'Back to dashboard' button is located at the bottom.

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For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.

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