For customers

Our **new** platform

nucleus platform

How to add SIPP regular additional contributions

4 Minute read

How to add SIPP regular addtional contributions

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 add SIPP regular additional contributions

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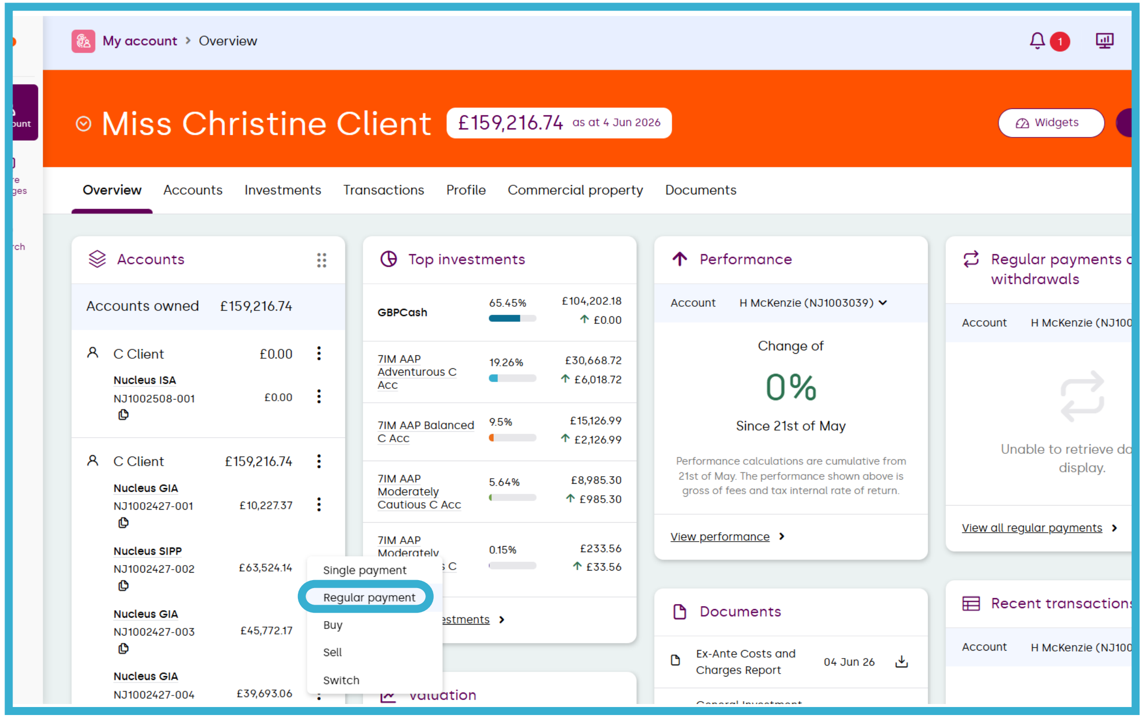
Before following this guide please ensure you've created an online account.

Once you've logged into your account, you'll arrive at the Overview page

To add a regular additional contribution, select the vertical ellipses next to the product.

A list of actions will appear. Select **'Regular payment'.**



Client regular payments in

Select either, **'Client'**, **'Employer'** or **'Third party'**.

If you are making an employer payment, please ensure your employment details are already recorded on your account before proceeding.

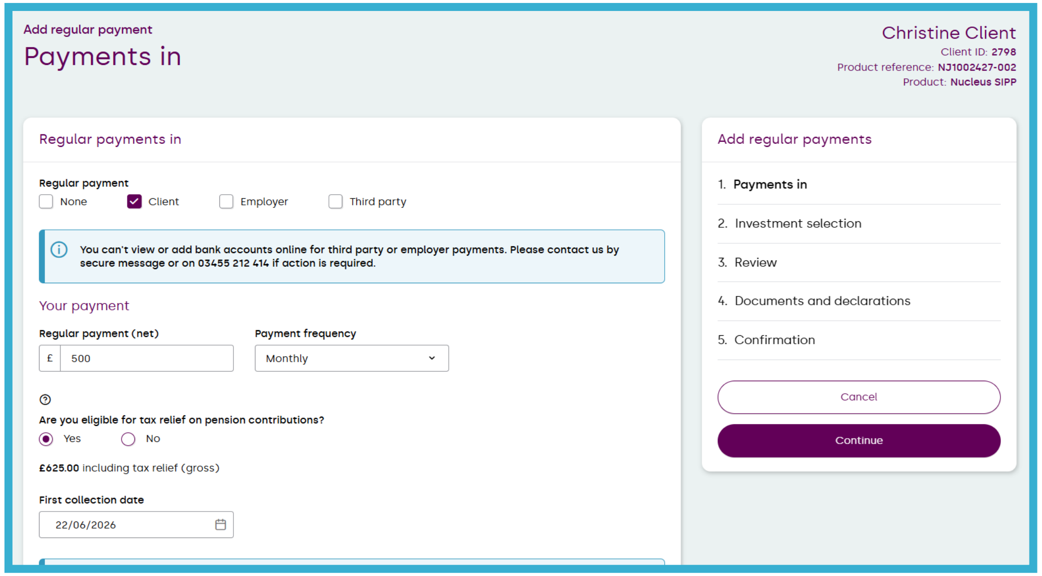
If your employment details have not yet been added, please complete the process outlined in our 'Change of Employment Details' guide on our website before making your payment.

You can select multiple regular payment types when completing the application.

Select **'Client'**.

Enter the regular payment amount, and payment frequency.

Confirm if the pension contribution is eligible for tax relief.



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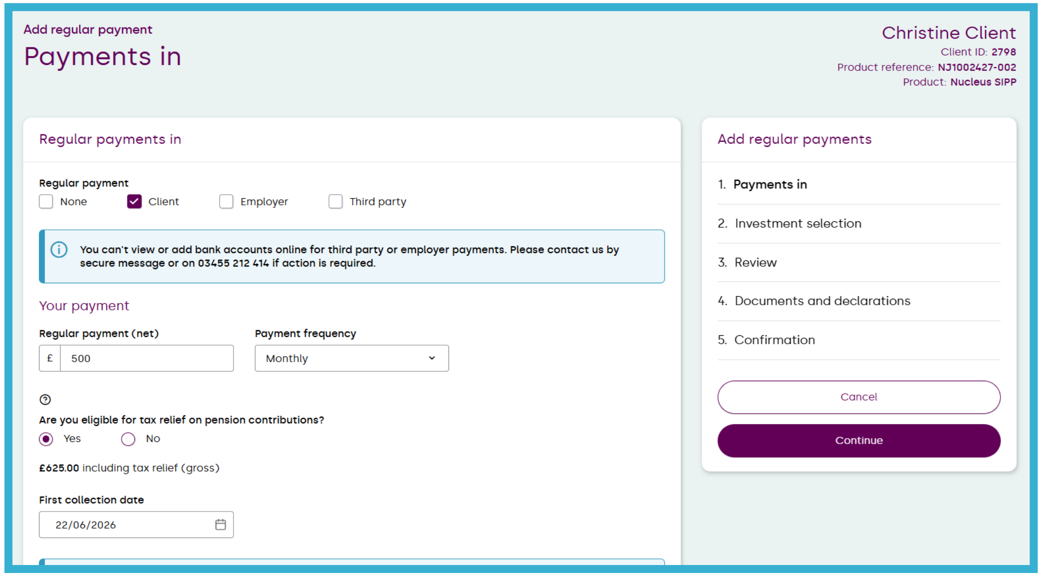
The collection date can be any date from 1 - 28 of the month. Please note, there's a minimum of 10 working days required to set up the Direct Debit

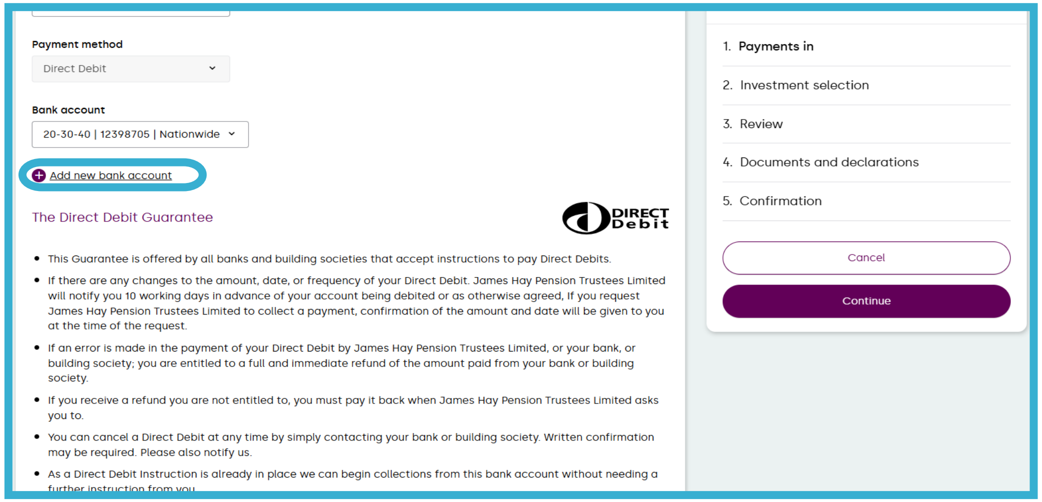
Then select the duration. You have the option to continue 'Until further notice' or add an '**Until date**'.



The payment method will be pre-selected to 'Direct Debit' and cannot be altered.

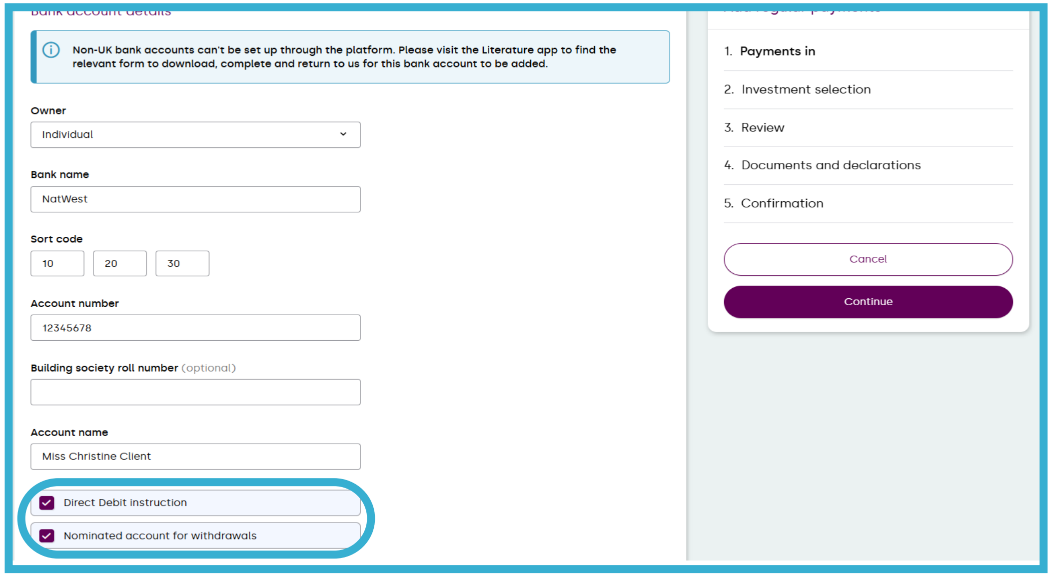
Select the bank account from the drop-down list.

If you need to add a new bank account, please select '**Add new bank account**'.



Complete your bank details.

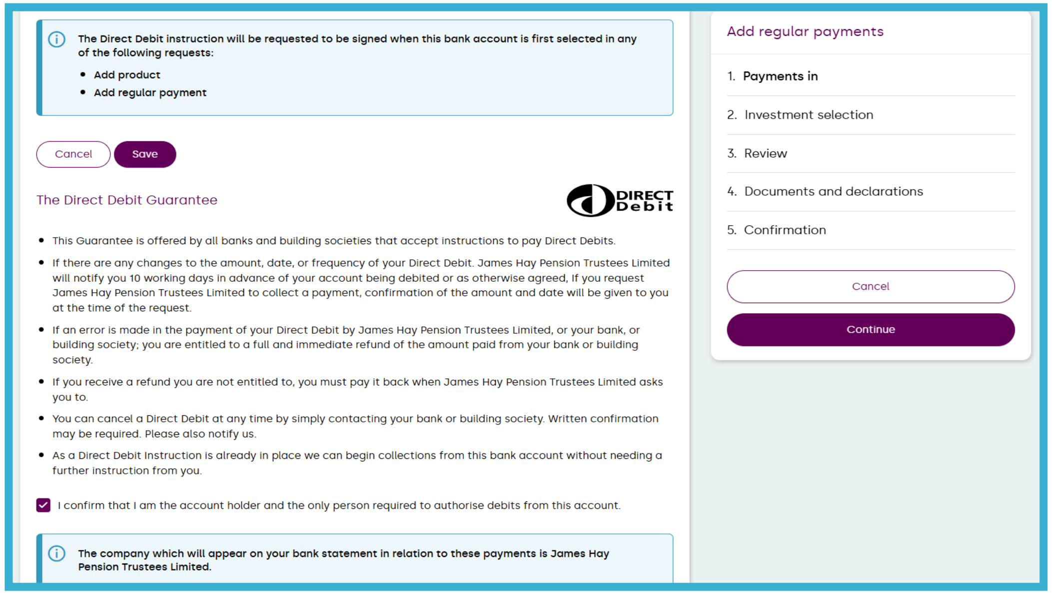
Select ‘**Direct Debit instruction**’, and ‘**Nominated for withdrawals**’ if needed.



Then ‘**Save**’, to submit the new bank details.

Tick to confirm that you are the holder and the person required to authorise debits from this account.

Then select ‘**Continue**’.



Employer regular payments in

Select ‘**Employer**’.

Then select either ‘**Employer (gross)**’ or ‘**Employer (net)**’.

Enter regular payment amount, payment frequency, first collection date and then the duration.

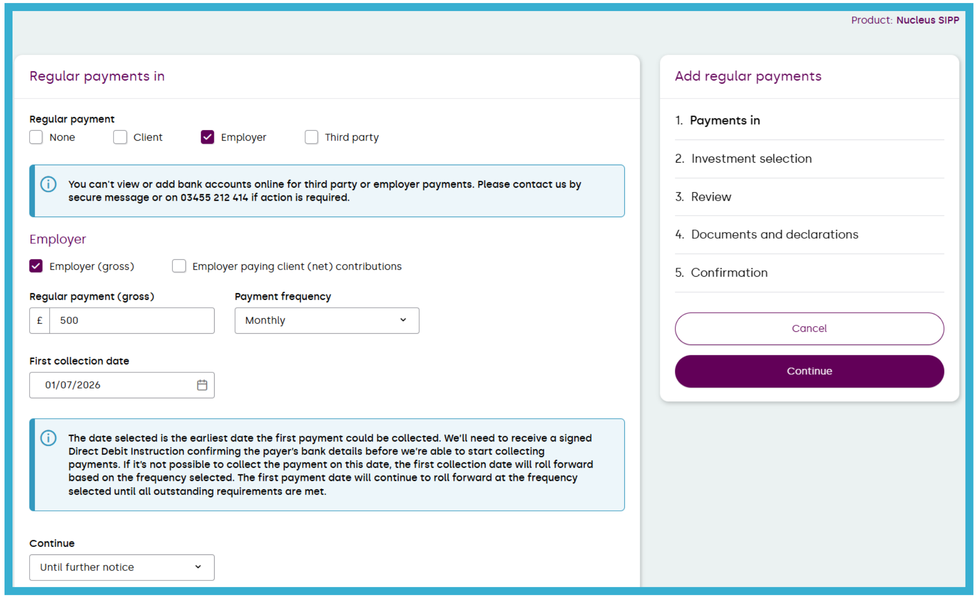
> The collection date can be any date from 1 - 28 of the month. Please note, there’s a minimum of 10 working days required to set up the Direct Debit instruction.

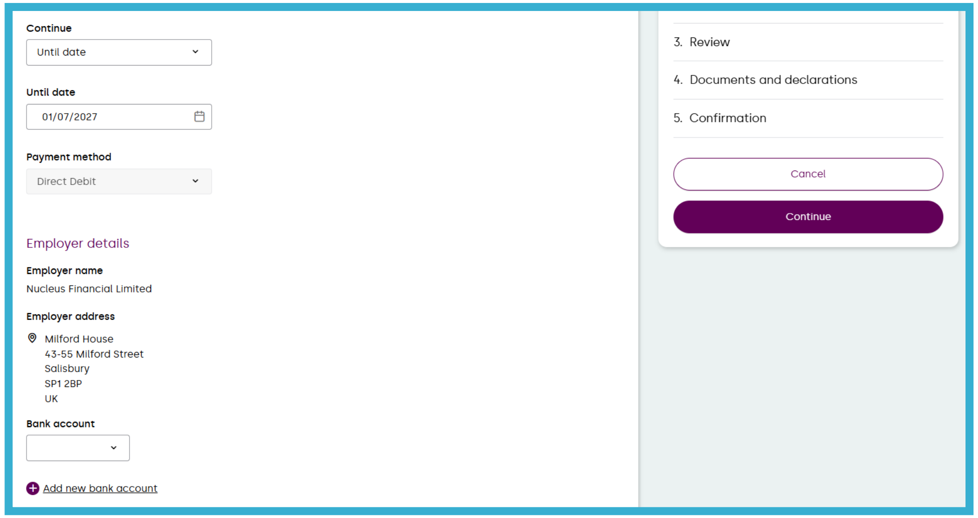
Then select the duration. You have the option to continue ‘Until further notice’ or add an ‘Until date’.

The payment method will be pre-selected to ‘Direct Debit’ and cannot be altered.

Select the bank account from the drop-down list.

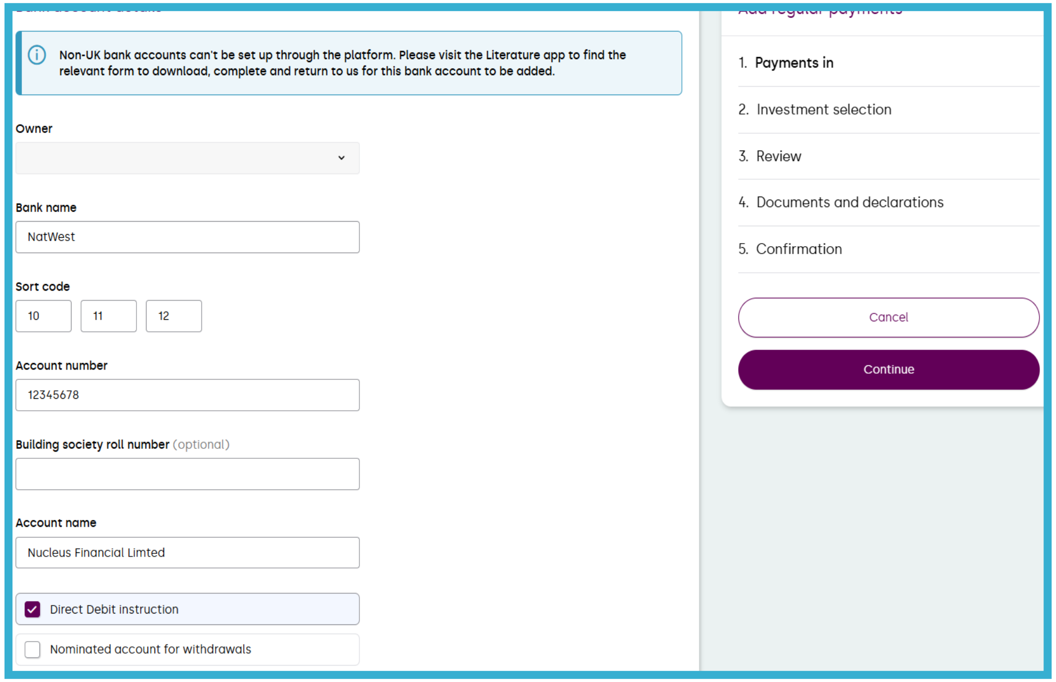
If you need to add a new bank account, please select ‘**Add new bank account**’.





Complete your employers bank details. Select **'Direct Debit instruction'**, and **'Save'**, to submit the bank details.

Then select **'Continue'**



Third party regular payments in

Select **'Third party'.**

Enter the **'Regular payment (net)'** amount, **'Payment frequency'**, the **'First collection date'**

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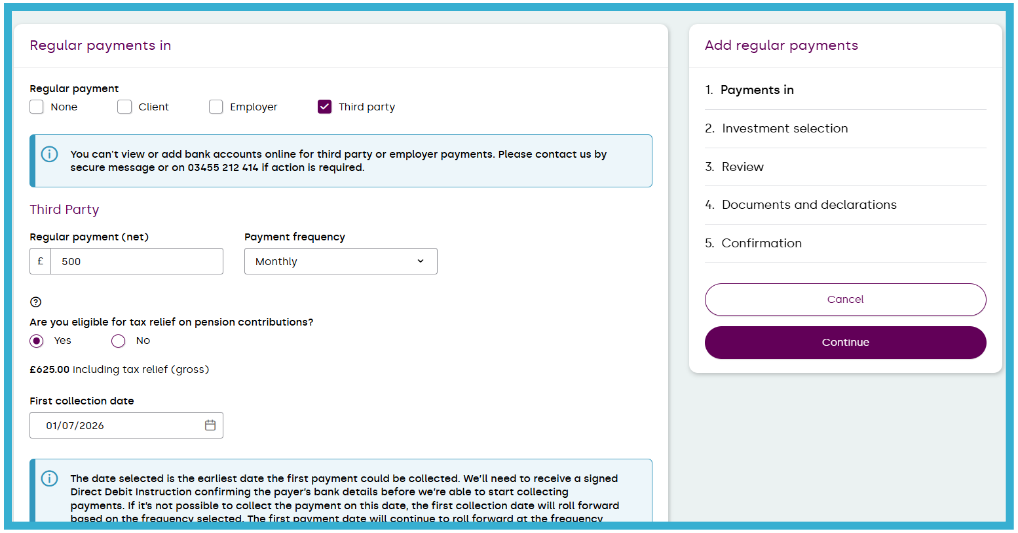
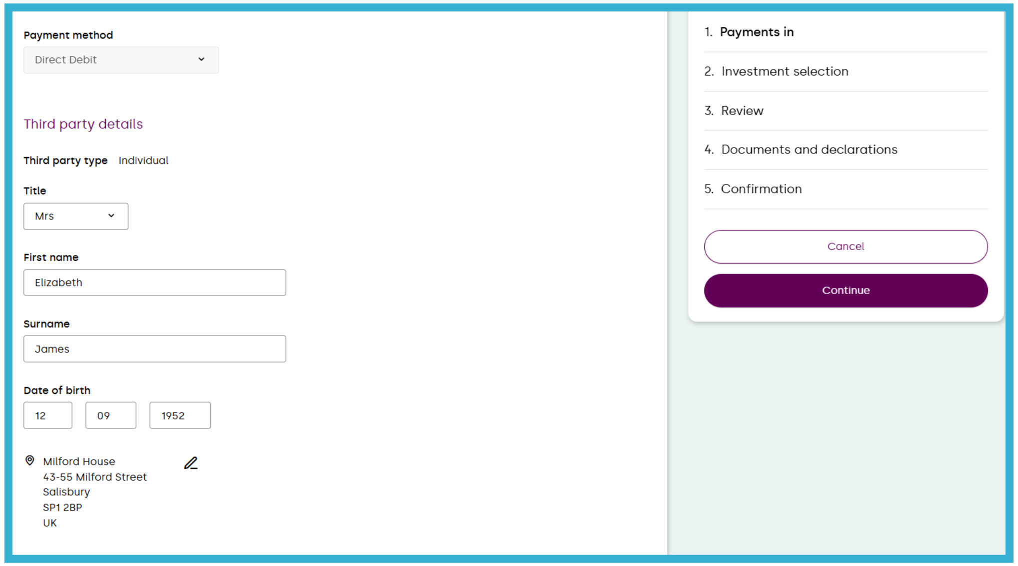
The collection date can be any date from 1 - 28 of the month. Please note, there's a minimum of 10 working days required to set up the Direct Debit instruction.



Then select the duration. You have the option to continue 'Until further notice' or add an 'Until date'.

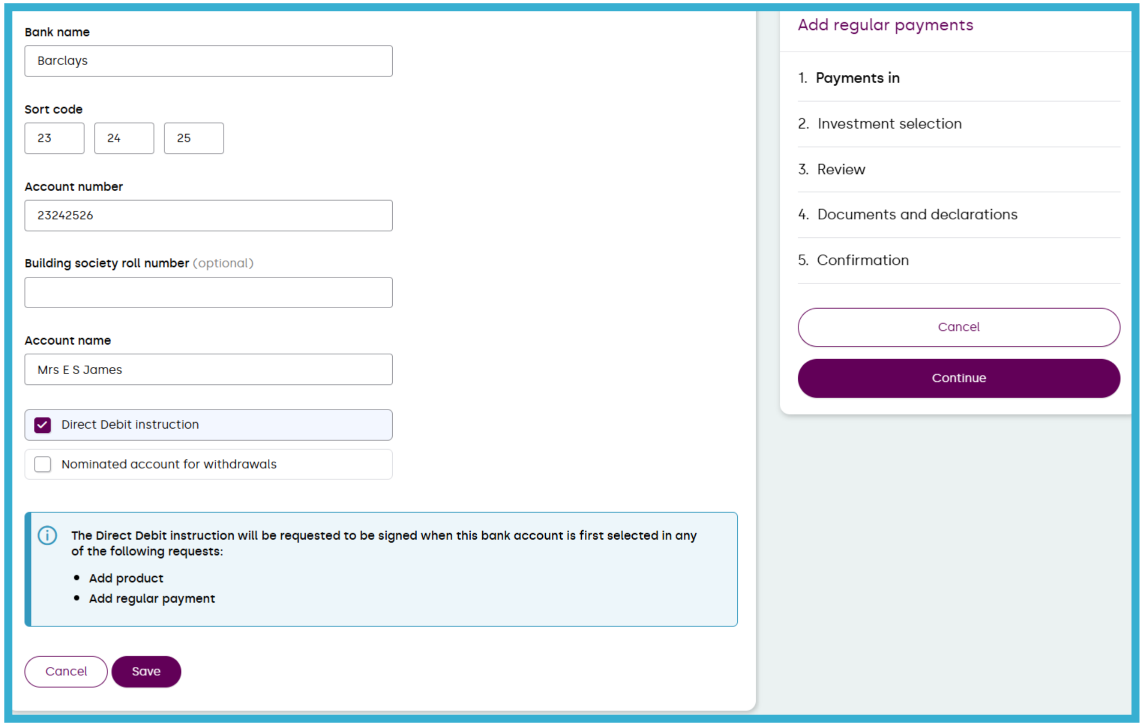
The payment method will be pre-selected to 'Direct Debit' and cannot be altered.



Enter the '**Third party details**.

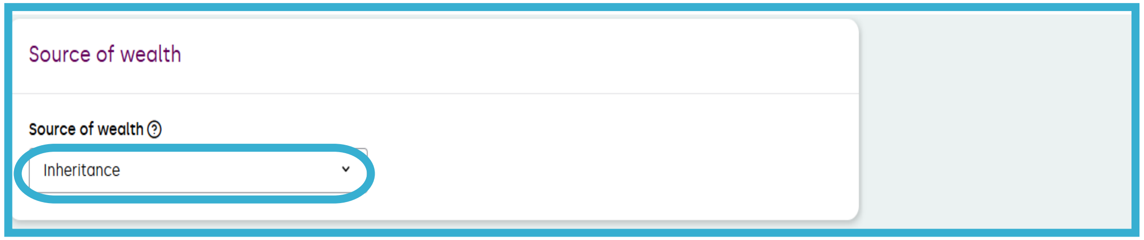
Select the bank account from the drop-down list. If you need to add a new bank account, please select 'Add new bank account'.

Complete third party bank details. Select '**Direct Debit instruction**', and 'Save', to submit the new bank details.



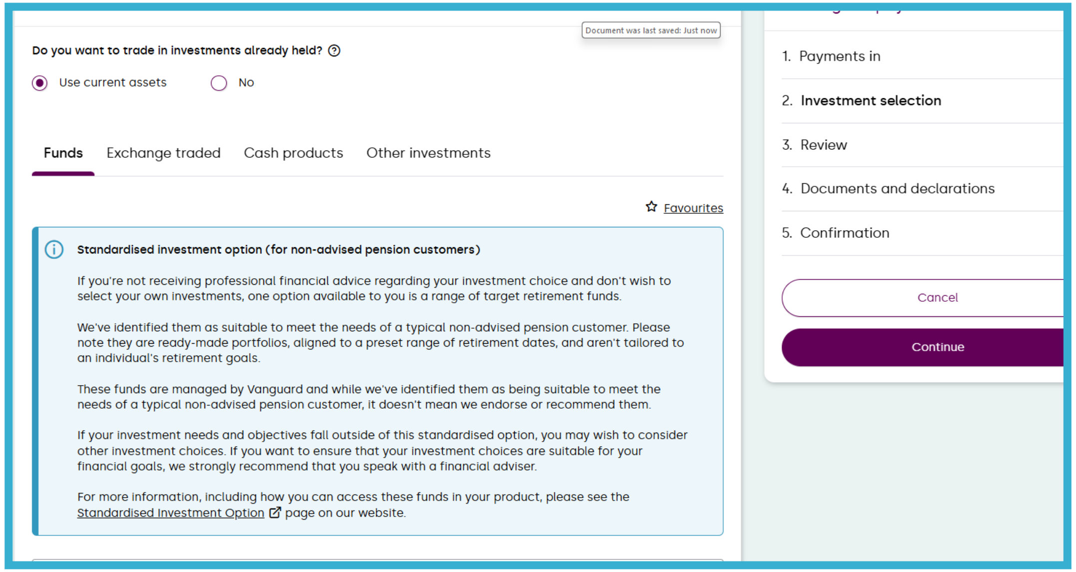
Select '**Source of wealth**'.

Then select '**Continue**'.



Investment selection

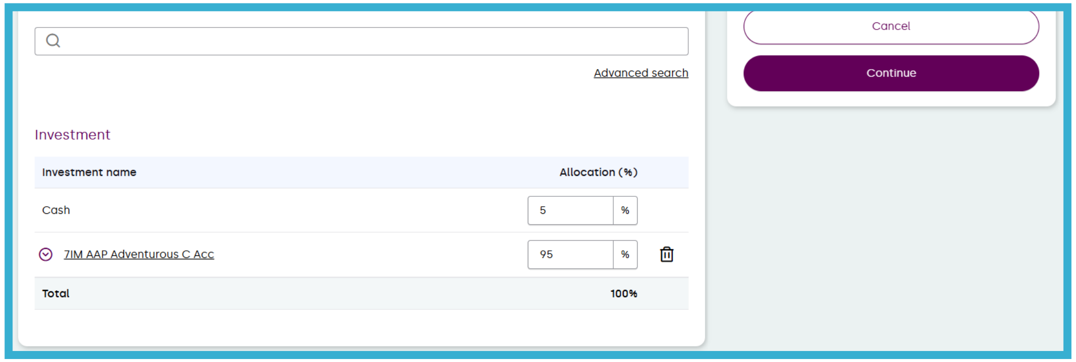
Do you want to trade in investments already held? .



Key messages

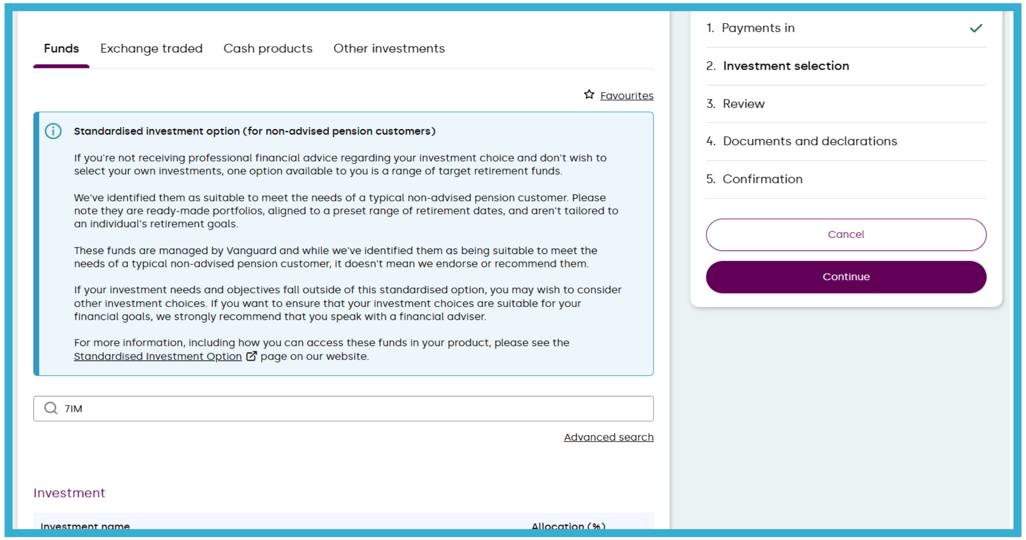
Selecting 'Use current assets' will show your current investment holdings without a percentage allocation for each investment.

If an investment you hold can't be purchased as part of this



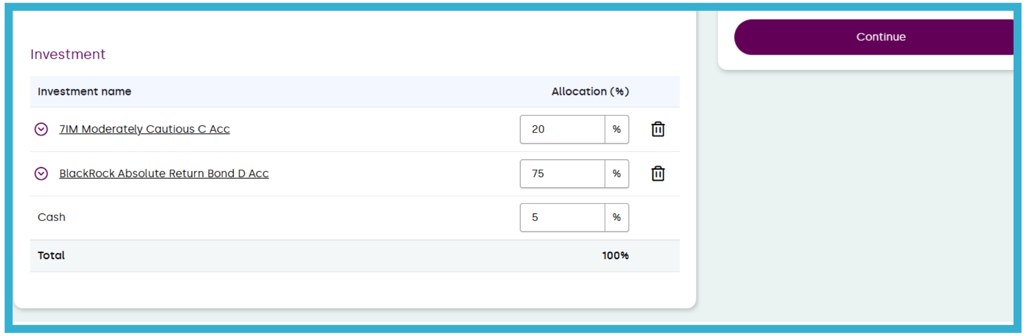
If you want to 'Use current assets' add the percentages for each investment, totalling 100%.

If you select, '**No**' search for your investment choices under the relevant headings.



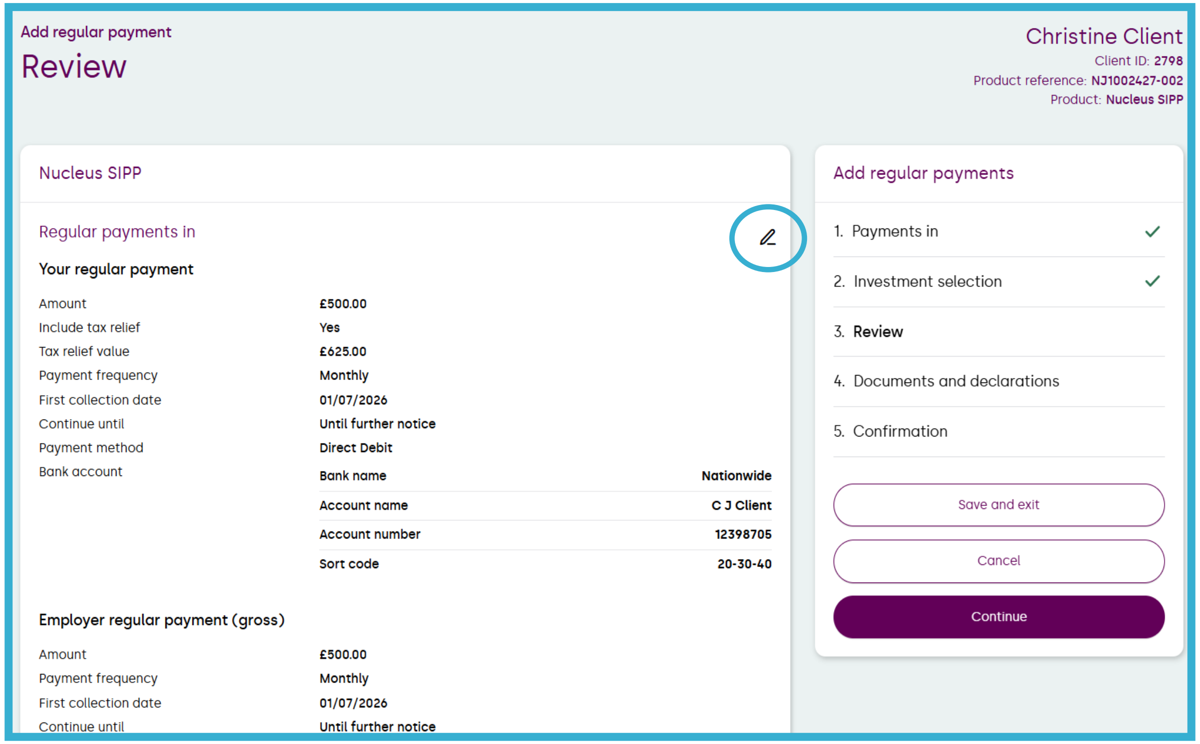
Add the percentages for each investment, totalling 100%.

Once you're happy that the details are correct select '**Continue**'.



Review

Carefully review the regular payment details for accuracy.



Use the '**pencil**' icon to make any necessary changes.

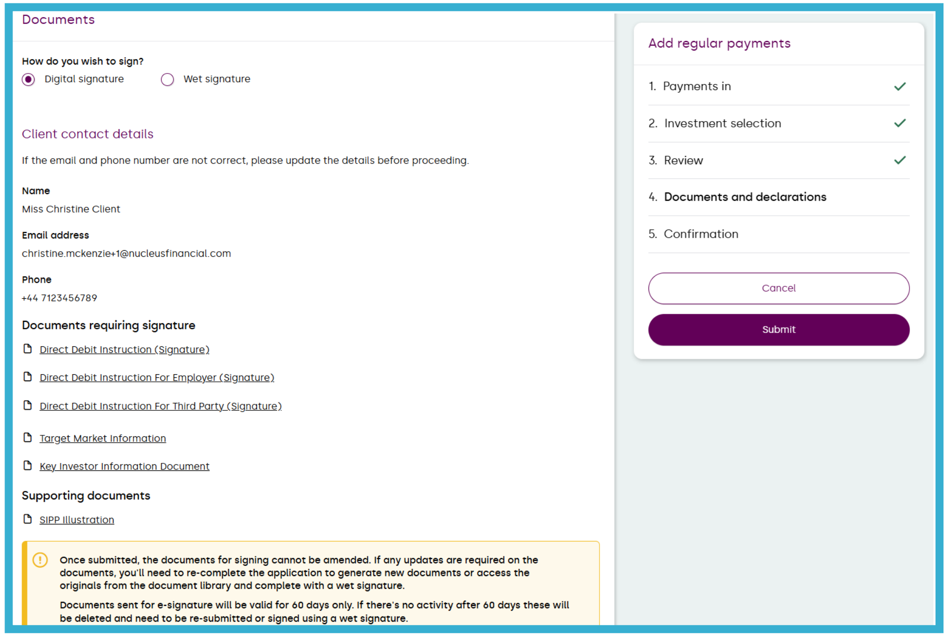
Once you're happy that the details are correct select '**Continue**'.

Documents and declarations

Choose to sign your documents by digital or wet signature.

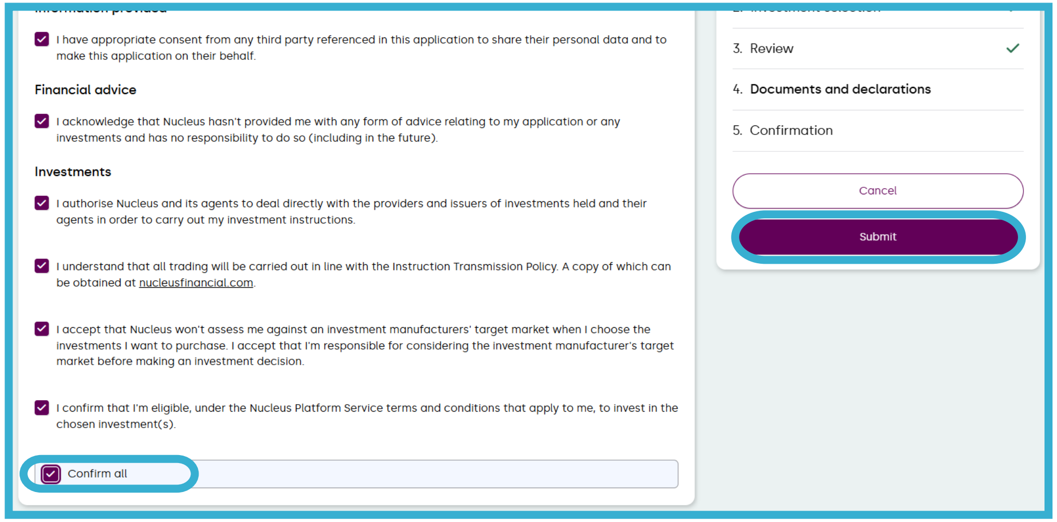
If you choose wet signature, complete your documents and send to us by secure message.

Supporting documents can be downloaded here.



Review the declarations carefully. To confirm acceptance, select each checkbox, or choose **'Confirm all'**.

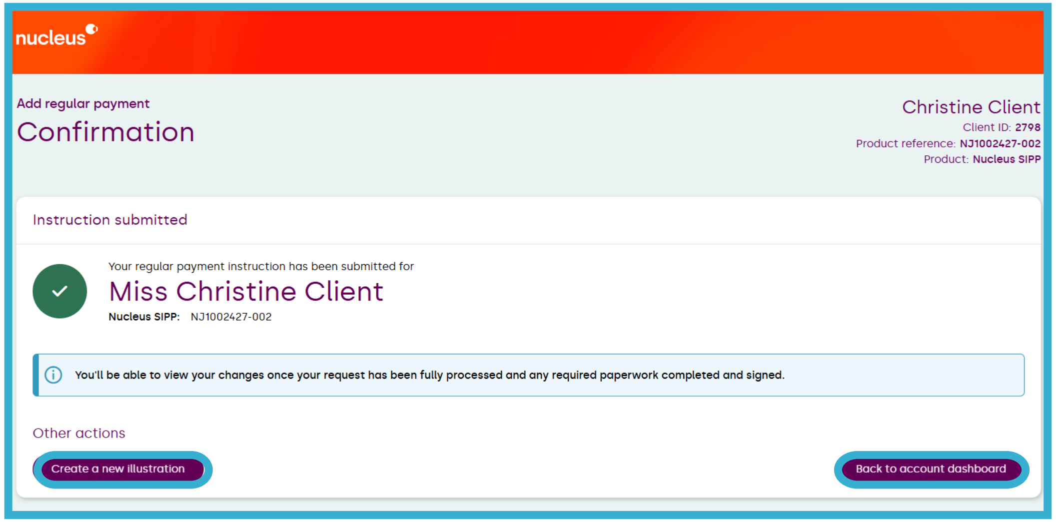
Then select **'Submit'**



Confirmation

A message will appear confirming that your 'regular payment' instruction has been submitted.

Your request will be fully processed once we're in receipt of the completed and signed paperwork.



From here you can, '**Create a new illustration**' or go '**Back to account dashboard**'.

If you have any questions, please contact us on **03455 212 414.**

03455 212 414

ask@nucleusfinancial.com

nucleusfinancial.com

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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