



Updating your personal details

Please complete this form in BLOCK CAPITALS and return it by:

- post to Nucleus, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB, or
- secure message via your online account with us.

If you need any help, please call your Customer Support Team or our general enquiry number 03455 212 414.

Using this form

Please use this form to update the personal information and bank details we hold on file for you.

For what to expect when we process your personal data, please read our group **Privacy Notice**, which is available on our website nucleusfinancial.com or by calling us on 03455 212 414.

Section 1 - Existing details

Title

First name(s)

Surname

Male Female

Date of birth (DD/MM/YYYY)

Customer number

Section 2 - Personal information

Please only complete this section if you wish to update the personal details linked to your Nucleus product(s).

Title

First name(s)

Surname

Male Female

Date of birth (DD/MM/YYYY)

Marital status

Married

Registered Civil Partner

Single

Divorced

Widowed

Other (please specify)

National Insurance number and/or Tax Identification number

Nationality

Dual nationality

Address

Postcode

Country of residence

Are you a US Specified Person? Yes No

U.S. Specified Person means a U.S. citizen or tax resident individual, who either holds a U.S. Passport, a U.S. Green Card, has a U.S. residential/ correspondence address or who was born in the U.S. and has not yet renounced their U.S. citizenship. More information on U.S. FATCA can be found at irs.gov/businesses/corporations/foreign-account-tax-compliance-act-fatca.

Telephone

Mobile

Email address (only if not previously provided)

Please note – This form cannot be used to amend the email address linked to your online account, as this forms part of your secure login credentials. Please use your online account if you wish to amend the email address linked to it.

Section 3 - Bank details

Please only complete this section if you wish to update the bank details linked to your Nucleus product(s).

UK bank account details

Bank name and address

Postcode

Account holder's name

Sort code

Account number

Account held for years months

International bank account details (if applicable)

IBAN/Account number

Payee

Bank name and address

Postcode

Intermediary bank/swift code

Swift code

Beneficiary bank code

Routing number

Currency

Section 4 - Declaration


I confirm that to the best of my knowledge and belief, the particulars given in this form are correct and complete, and I undertake to inform Nucleus, without delay, if there are any changes to the information contained in this form.


Signature


[Signature box]

Print name

Date (DD/MM/YYYY)

 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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