For customers

For full functionality, please download and complete this form as a PDF.

Our new platform

nucleus platform

Updating your personal and employer 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/privacy-notice 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 specifiy)

NU792
10/2026

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

Country

Account holder's name

Sort code

Account number

Account held for years months

If you are actively taking withdrawals, please tick this box if you wsh to have these payments redirected to the bank account details provided above.

If you wish to change the account for a regular payment in, please complete a new SIPP Direct Debit Mandate or GIA/ISA Direct Debit Mandate and submit it to us. The documents are available from our website literature.nucleusfinancial.com.

Section 4 - Employer details

Please only complete this section if you wish to update your employment information.

Employment status

- Employed
- Self-employed
- Retired
- Child aged under 16 years
- Caring for a child aged under 16 years
- Caring for a person aged 16 years or over
- In full time education
- Unemployed

Company name

Contact name

Country of establishment/incorporation

Registered number (if applicable)

Nature of business

Correspondence address

Postcode

Phone

Email

Employer/business name

Employer/business address

Postcode

Nature of business

Annual earnings

Section 5 - 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

Print name

Date (DD/MM/YYYY)

Supporting documentation

If not previously supplied, please enclose photocopies of one of the following documents when requesting an update to these details:

Date of birth
- birth certificate
- unexpired passport
- unexpired UK old style driving licence (not provisional)
- unexpired UK photocard driving licence

Change of name
- marriage certificate
- unexpired passport
- unexpired driving license

Change of address
- council tax bill dated within the last 12 months
- utility bill
- any form of ID that contains an address

Change of bank details
- recent bank statement

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 Relay UK service on 18001 03455 212 414.

"Nucleus" is the trading name for Nucleus Financial Platforms Limited (NFPL) (registered in England, number 06033126), Nucleus Group Services Limited (NGSL) (registered in England, number 02538532); James Hay Services Limited (JHS) (registered in Jersey, number 77318); James Hay Administration Company Limited (JHAC) (registered in England, number 04068398); James Hay Pension Trustees Limited (JHPT) (registered in England, number 01435887); James Hay Wrap Managers Limited (JHWM) (registered in England, number 04773695); James Hay Wrap Nominee Company Limited (JHWNC) (registered in England, number 07259308); Nucleus Financial Services Limited (NFS) (registered in England, number 05629686). NFPL, NFS, NGSL, JHAC, JHPT, JHWM, JHWNC have their registered office at Suite B & C, First Floor, Milford House, 43 55 Milford Street, Salisbury, SP1 2BP. JHS has its registered office at Aztec Group House, IFC6, The Esplanade, St Helier, Jersey, JE4 0QH. JHAC, JHWM and NFS are authorised and regulated by the Financial Conduct Authority. NFPL, NGSL, NFS, JHWM, JHPT, JHAC and JHS are members of a VAT group with VAT registration number 514 0358 80. All companies are wholly owned subsidiaries of NFPL. Further details of the Nucleus Group can be found at nucleusfinancial.com (12/25)