For advisers

Our new platform

nucleus platform

How to search for a client

2 minute read



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How to use this document

Important information will look like this.

Key messages

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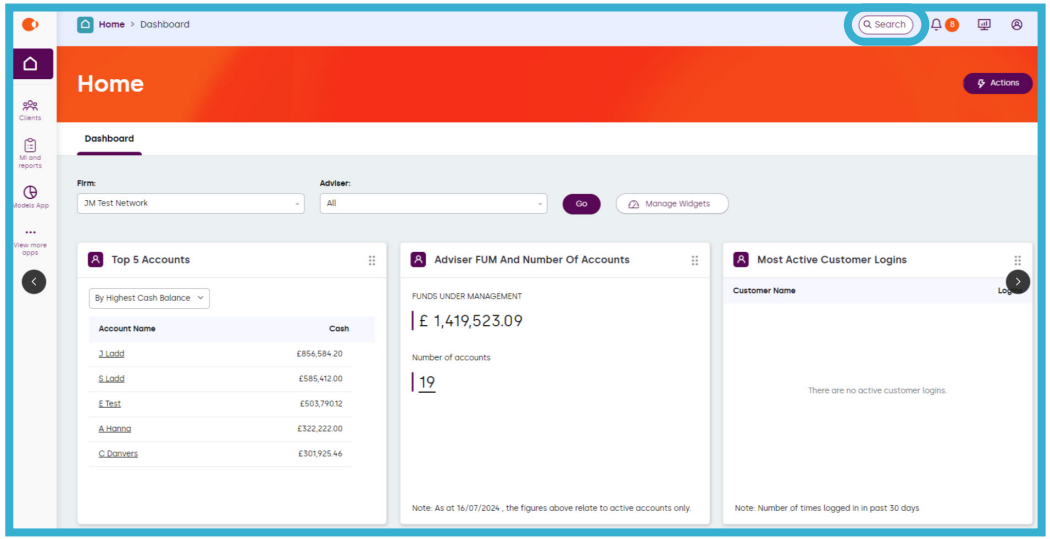


Useful info will look like this.

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

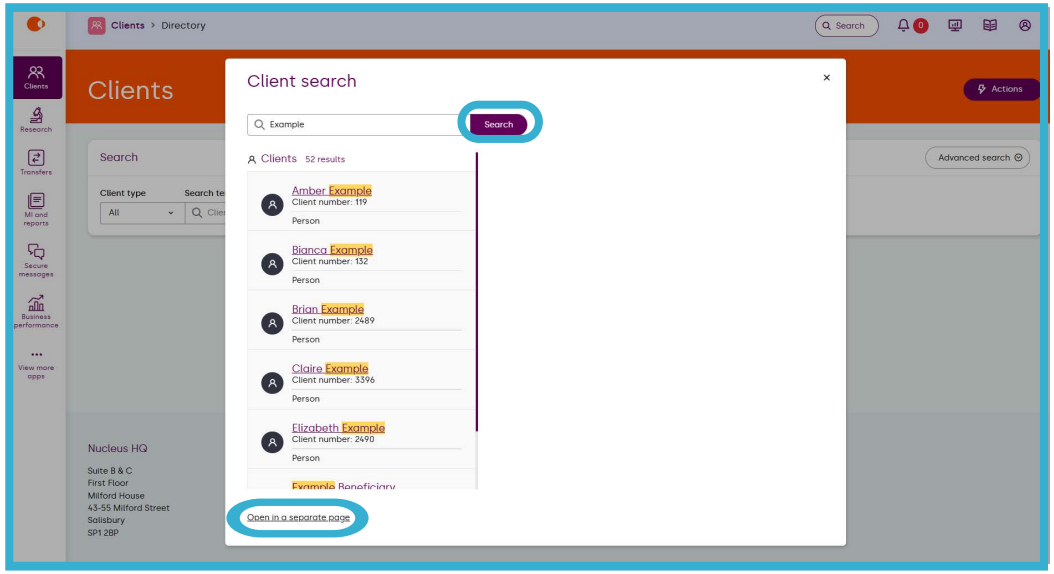
How to search for a client

Select **'Search'** in the top right corner.



Enter the client's name or client ID into the search bar, and then select **'Search'**.

A list of clients will appear. Select your client.



To view a list of client with the same surname select '**Open in a separate page'** to see a full list, to help you ensure you're selecting the correct client.

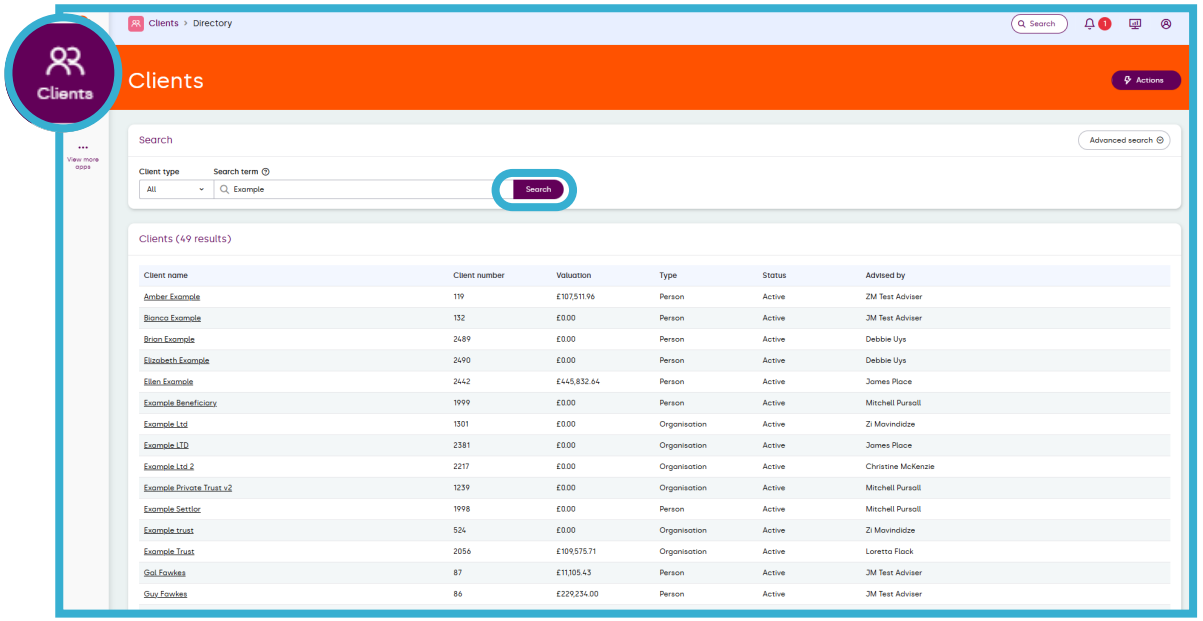
Using the client app

From the home page select the **'Clients'** app.
A list of clients will appear.

To search for your client, enter your customer's name, ID or account number into the search bar.

E.g. account number NJ1000126.

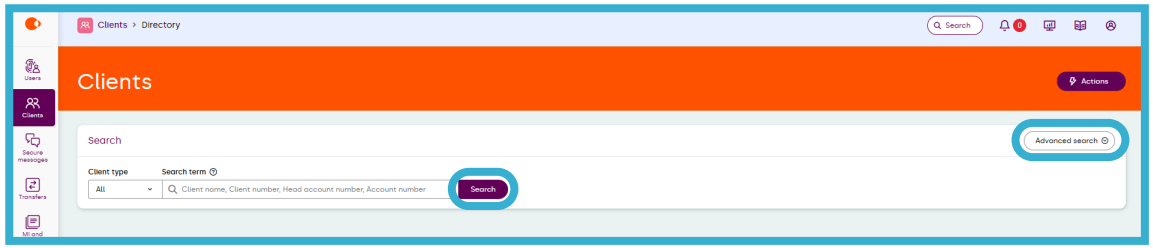
Select **'Search'** to search for your client.



Refining results

To refine the search results, select **'Advanced search'.**

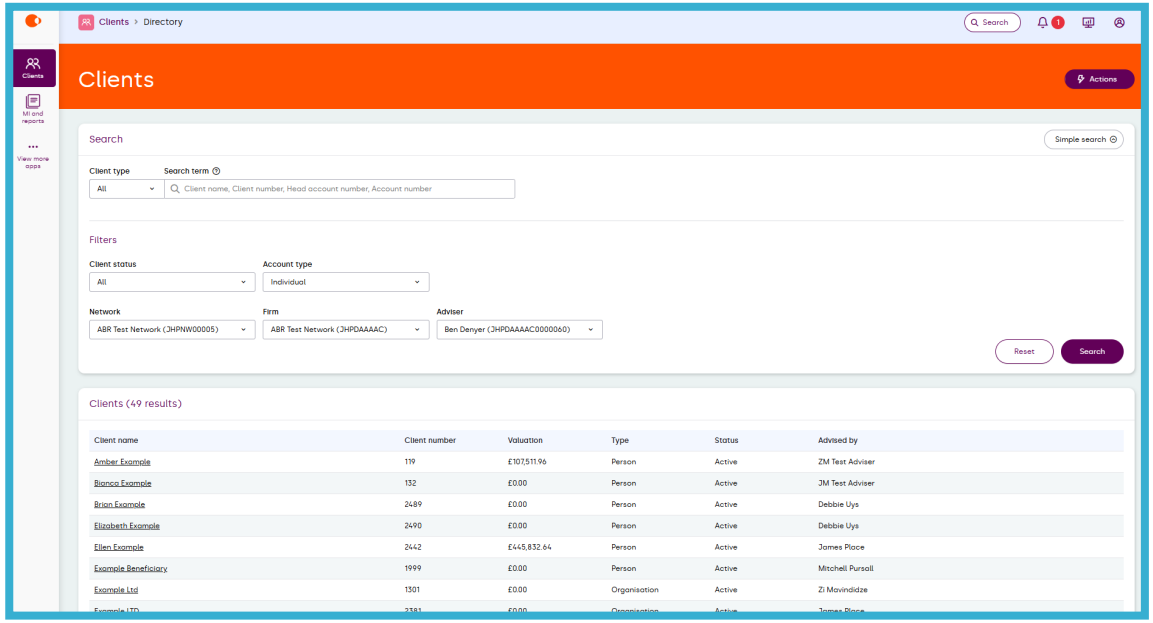
Select **'Search'**, to look for your client.



The client search results will then appear.

You can refine the results by selecting client type, account status and account type from the drop down lists.

You can also select your specific network, firm or adviser from the drop down lists.



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06/2026