


Customer: Execution only

Flexi Isa top up application form

- ✓ Please use this form if you wish to make single or regular cash contributions to your Isa. This includes available Isa allowance and replaceable withdrawal allowance on your account.
 - ✓ This process is designed for execution only customers i.e., customers who have not taken advice and who are acting on their own initiative or for customers who have taken advice from an adviser who doesn't use the Nucleus platform.
 - ✓ If you've not received advice from a financial adviser, we must remind you that progressing on a non-advised basis may affect the regulatory protection you would otherwise be entitled to. For example, you will not have recourse against an adviser firm in regard to investment decisions made by you. Your right to pursue compensation via the Financial Services Compensation Scheme is not affected when we execute a transaction for you on a non-advised basis.
-  If anyone forgets to add a date to their signature, we'll treat the day we receive this form as the signing date.

Once this form has been completed and signed, please send it to us at the below address.

 Nucleus client relations, PO BOX 26968, Glasgow G2 9DY  0131 226 9535 Option 1  client.contact@nucleusfinancial.com

Customer details

Name

Nucleus account number

N

Contributions

The Nucleus Isa is a flexible stocks and shares Isa, with an investment allowance of £20,000 per tax year less any amount invested into a cash Isa with another provider during the same tax year. The total subscription limit to both a stocks and shares Isa and a cash Isa in the same tax year cannot exceed £20,000. Nucleus does not offer a cash Isa.

The Nucleus Isa is a flexible Isa which means you can withdraw and replace Isa monies within a tax year without it counting towards the annual subscription limit.

You can top up your Isa in different ways: single lump sum payment, regular contribution via direct debit, Bed & Isa (using your General account) or inter account transfer (using your General account).

Personal contributions

Please select the appropriate contribution type(s):

Single lump sum contribution £

Payment method

When prompted, please send the payment to the following bank account, quoting your Nucleus Isa N account number as the payment reference:

Isa account Payee	Sort code	Account no
Nucleus Financial Services Ltd	16-04-00	31266744

Regular contribution £

Frequency of contributions

Monthly Quarterly Half yearly Annually

Collection date for the contributions (this must be between 1st-28th of the month)

If no start date is provided, we will set up the Direct Debit for the first of the month following the date that this form is signed.

If regular contribution payments are to be made to your Isa, please also complete the attached Direct Debit Mandate, and send it to Nucleus. Please allow at least 10 business days for us to set up any Direct Debits.

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Signature

Signed

Print name

Date (dd-mm-yyyy)

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Checklist of additional documentation required

Personal contributions

Direct debit mandate completed for regular contributions

Isa declaration (existing Isa clients only) (if requested)

Please note that telephone calls may be recorded in order to monitor the quality of our customer service and for training purposes.

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0131 226 9535, or via the Typetalk service on 18001 0131 226 9535.



0131 226 9535



client.relations@nucleusfinancial.com



www.nucleusfinancial.com