


Change of client bank details


Completing the form

Please ensure this form is completed accurately and in full for all the sections that are relevant to you and your adviser. If you are unclear about anything, please contact your adviser. Missing or unclear information may delay the payment of your pension benefits.

Returning the form


Please return the completed form via Jira messaging or by post to:

 Nucleus,
PO Box 26968,
Glasgow,
G2 9DY

 If you hold an offshore bond, we are required to send RL360 this form along with a certified copy of the associated bank statement. Please ensure this is provided to us when sending back this form.

Signing the form

We can accept a handwritten or electronic signature.

 If you forget to add a date to your signature, we'll treat the day we receive this form as the signing date. Once we receive this instruction in the post, your client relations manager will be in touch with you within two business days.

If you have any questions please contact us by email on:

 client.relations@nucleusfinancial.com

Additional Support

We recognise that personal circumstances, life altering events, or health issues could mean that you need some extra support. If there is anything we can do to help make dealing with us easier, please speak to one of our team and we'll work with you to put the right help in place. For more information on the types of support we can offer, visit nucleusfinancial.com/supporting-customers.

Client details

Name

Client reference number starting '100'

This form is to add a new bank account to your Nucleus wrap, we won't accept this form to amend existing bank account details already held.

Any new and existing regular withdrawals/payments will now be made to this bank account, unless otherwise instructed by you. Please note that any withdrawals due in the next 15 business days will still go to the original bank details that we hold.

Please confirm the last four digits of the bank account(s) you would like us to remove from your Nucleus wrap (if required). If we do not receive confirmation, the existing bank details will remain in place.

Bank/Building society

Sort code

Account number

Roll number

Name(s) of bank account holder(s)
(Please confirm the full name(s), avoiding use of initials)

Please confirm the full name of the account holder registered at the bank or building society. If it's a joint account, please note the full name of both account holders, e.g. Mr Joseph Bloggs and Mrs Jane Bloggs

Authorisation

Client/First Trustee

Signature

Print name

Date (dd-mm-yyyy)

— —

Joint holder/Second trustee

Signature

Print name

Date (dd-mm-yyyy)

— —

Third Trustee

Signature

Print name

Date (dd-mm-yyyy)

— —

Fourth trustee

Signature

Print name

Date (dd-mm-yyyy)

— —

Individuals and corporates

Please make sure that you are the bank account holder/joint account holder as we are unable to make payments to third parties, even with your permission.

For trust clients only

This form must be signed by all trustees.

We acknowledge that this is an account belonging to the trustee/beneficiary/the solicitor/the settlor (delete as applicable) and confirm that at present we do not have a trust account set up. In providing the authorisation above, we confirm that the trust deed provides us with the power to make payments into a non-trust bank account.

We accept that there may be implications of trust monies being paid to a non-trust bank account and accept full responsibility for the tax consequences of this. We acknowledge that payment to a third party is a deviation from the Nucleus terms and conditions.

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