

Get closer to your investments

Nucleus Go is our easy-to-use and secure online portal which gives you at-a-glance access to your investment portfolios. The functionality allows you to view all of your investments online, lets you authorise ad-hoc fees you've agreed with your adviser, and it's mobile responsive so you can view your portfolios at any time.



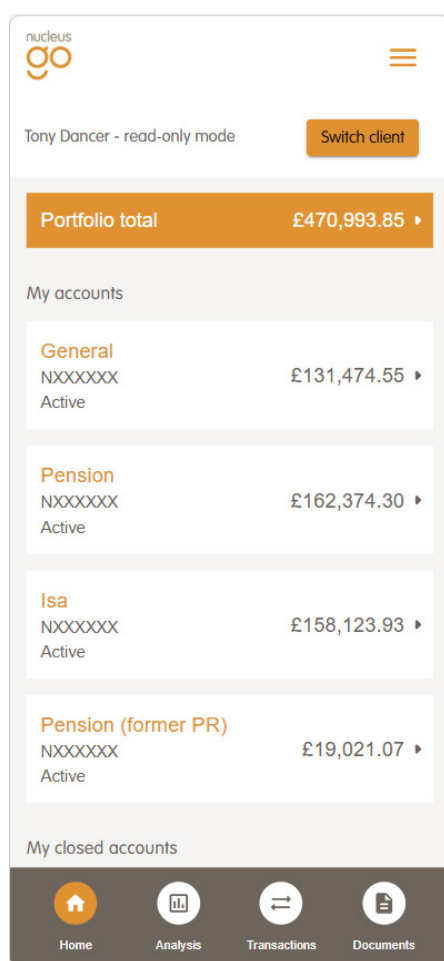
You can easily view all your investments online, giving you detailed information at a glance.



Track the performance of individual accounts and overall portfolio over different time periods.



Our iOS app makes it easier for you to keep track of your investments on the go.



Go functionality gives easy access to information such as money paid in, withdrawals, fund switches, holdings, gains/losses - over any date range you like.

You can also easily view and download your Nucleus documentation, and update your correspondence preferences to view documents online rather than receiving paper copies.

Making it easier to track your investments

We currently have an iOS version of Nucleus Go available for you to download from the App Store. For the moment this is only available on Apple devices, but we're working on an Android equivalent in the future.

Simply search for Nucleus Go on the App Store and hit 'Get' to download our app. Once opened, just select login or register to get started.

Accessing your account on Go

- ➔ If you have existing login details, you can use these to log in to our Nucleus Go iOS app or Go at go.nucleusfinancial.com
- ➔ If you've never had any login details for our online services, please contact your financial adviser who will arrange to have these sent to you.
- ➔ If you're having problems accessing your account on Go, check out our helpful guidance on the next page, or visit: nucleusfinancial.com/client-home/nucleus-go-client-support



Troubleshooting

Not registered – four easy steps

1

Get in touch with your adviser to request access to Nucleus Go.

2

Make sure your adviser has your correct email address so we can send you an invitation to register on Go.

3

We'll send you an email with your username and a letter, with your unique registration code to use on the [Go registration](#) page.

4

Complete your registration and you can log in to Nucleus Go to see your Nucleus account at any time.

Locked out – four easy steps

1

Check with your adviser that your correct email address has been used to register you on Go.

2

Complete the 'forgot your password' form on the [Go login](#) page.

3

We'll email you a code to use to unlock your account. You just need to click on the link in the email to prefill the code in the 'forgot your password' form.

4

Create a new password. You can't use a previous password.

Lost registration email or letter – four easy steps

1

Ask your adviser to look up your username, and check they have your correct email address.

2

Complete the 'forgot your password' form on the [Go login](#) page.

3

We'll email you a code to use to unlock your account. You just need to click on the link in the email to prefill the code in the 'forgot your password' form.

4

Create a new password. You can't use a previous password.

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



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www.nucleusfinancial.com

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