

For advisers

Our new
platform

nucleus^o
platform

How to update
allowance details

🕒 2 minute read



How to update allowance details

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Declaration 6

How to use this document



Important information will look like this.

Key messages

Key messages will look like this.



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 update allowance details



This guide is demonstrated using an adviser user with master user role permissions.

If you have different user role permissions, some functionality may not be available to you.

Key messages

To update allowance details, you first need to search for your client. To search for your client please refer to the guides on our website.

From the client's home page, select the 'Actions' button.

Miss Belle Hanna £949,172.88 as at 14 August 2024

Widgets Actions

Client number 1303	Age 68	Date of birth 19-September-1955	Firm JM Test Network
Phone +44 7493682101	Email amy.hanna5@nucleusfinancial.com		Adviser Amy Hanna

Address
15 Stout Grove,
Bishopdown, SP1 3QF

Residence
UK

Primary tax residency
UK

Overview Investments Transactions Profile Commercial property Documents Workflow

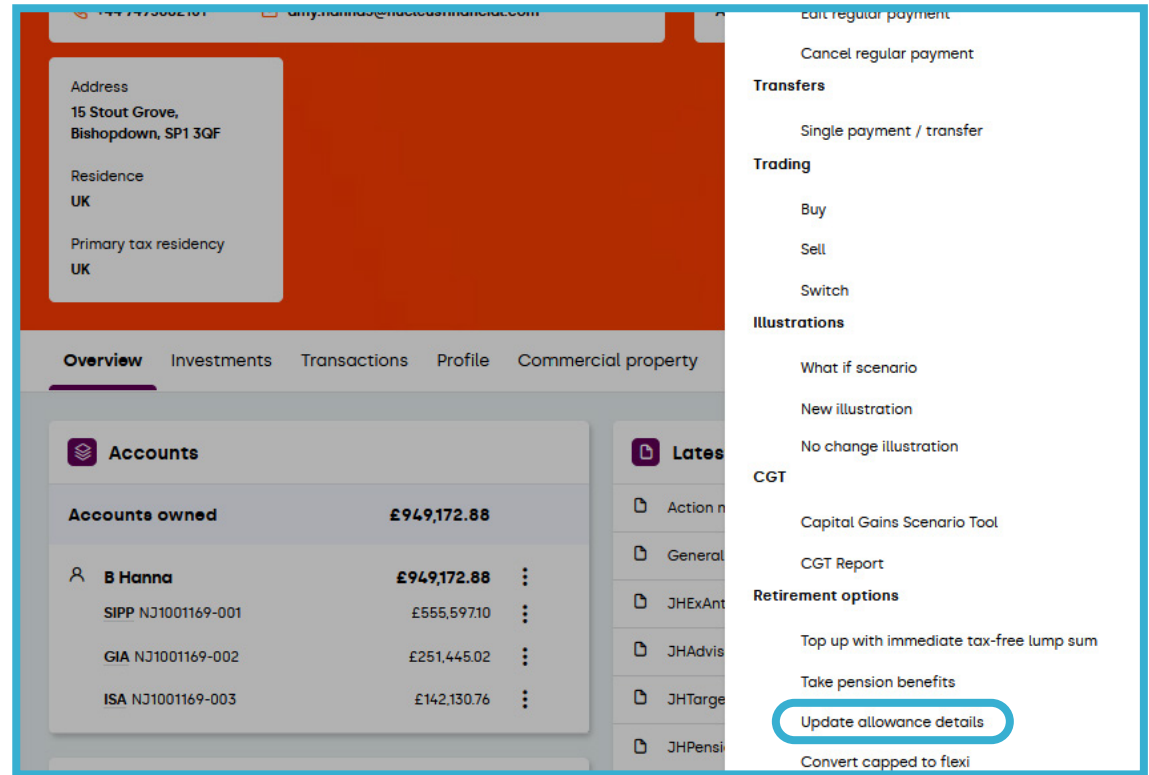
Accounts owned		£949,172.88
B Hanna	£949,172.88	⋮
SIPP NJ1001169-001	£555,597.10	⋮
GIA NJ1001169-002	£251,445.02	⋮

Latest documents		
Action might be needed - Direct Debit set up	07 Aug 24	⬇
General Investment Account Illustration	01 Aug 24	⬇
JHExAnteCostsAndChargesDisclosure	01 Aug 24	⬇
JHAdviserChargeConfirmation	01 Aug 24	⬇

A list of actions will appear. Select **'Manage accounts'** and then **'SIPP'**.

The screenshot displays a client overview page for Miss Belle Hanna. The main content area shows her name and a balance of £949,172.88 as at 14 Aug. Below this, there are two grey boxes containing client details. The first box lists Client number (1303), Age (68), Date of birth (19-September-1955), Phone (+44 7493682101), and Email (amy.hanna5@nucleusfinancial.com). The second box lists Address (15 Stout Grove, Bishopdown, SP1 3QF), Residence (UK), and Primary tax residency (UK). At the bottom, there is a navigation bar with tabs for Overview, Investments, Transactions, Profile, and Commercial property. On the right side, there is an 'Actions' sidebar menu. The 'Manage accounts' option is highlighted with a red circle, and under it, the 'SIPP - NJ1001169-001' option is also highlighted with a red circle. Other options in the menu include Clients, Payments, Transfers, Withdrawals, Trading, Illustrations, CGT, B Hanna (with sub-items SIPP, GIA, and ISA), New client, and Add product.

Under retirement options, select **'Update allowance details'**.



Allowance details

Confirm all applicable allowance details.



If any value is not applicable to update, please leave as zero.

Declaration

Read through the declaration and tick to confirm completion.

Once you're happy with the accuracy of the information, select **'Submit'**.

Allowance details

Lump Sum Allowance (LSA) details

LSA previously used in this account, as at 5 April 2024 ⓘ
£0.00

LSA previously used in this account, on or after 6 April 2024 ⓘ
£8,125.00

LSA used by benefits that commenced before 6 April 2006 ⓘ
£0.00

Other LSA as at 5 April 2024 you need to tell us about ⓘ

£ 1000

Other LSA on or after 6 April 2024 you need to tell us about ⓘ

£ 0

Lump Sum Death Benefit Allowance (LSDBA) details

LSDBA previously used in this account, as at 5 April 2024 ⓘ
£0.00

LSDBA previously used in this account, on or after 6 April 2024 ⓘ
£8,125.00

LSDBA used by benefits that commenced before 6 April 2006 ⓘ
£0.00

Other LSDBA as at 5 April 2024 you need to tell us about ⓘ

£ 0

Was part of this amount used in respect of a Serious Ill Health Lump Sum taken prior to age 75? ⓘ

Yes No

Other LSDBA on or after 6 April 2024 you need to tell us about ⓘ

£ 0

LSA used ⓘ
£9,125.00

LSDBA used ⓘ
£8,125.00

Declarations

Disclosure

The information provided in this application, including special category data where expressly required, is accurate and complete to the best of my knowledge.

Update allowance details

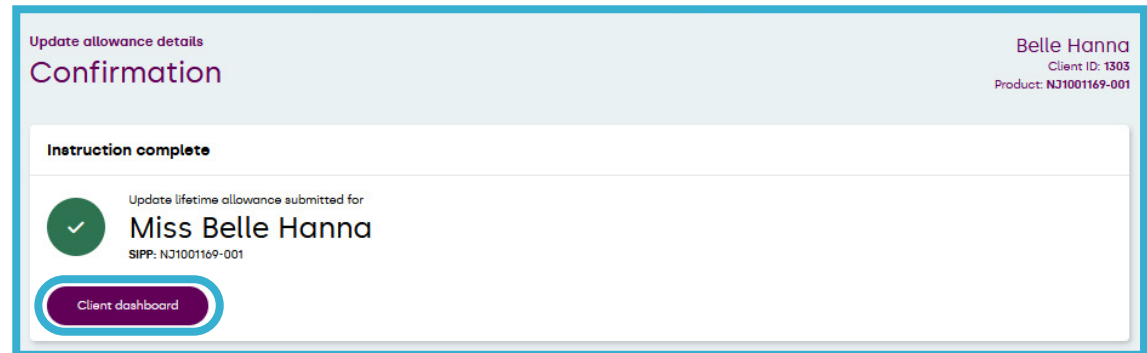
- Update allowance details
- Confirmation


Cancel


Submit


The allowance details have been updated successfully.

From here, you can select **'Client dashboard'** to return to the client's home page.



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 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 Tynetalk service on 18001 03455 212 414.

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