For advisers

Our new platform

nucleus platform



How to update allowance details

2 minute read

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Allowance details 6

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

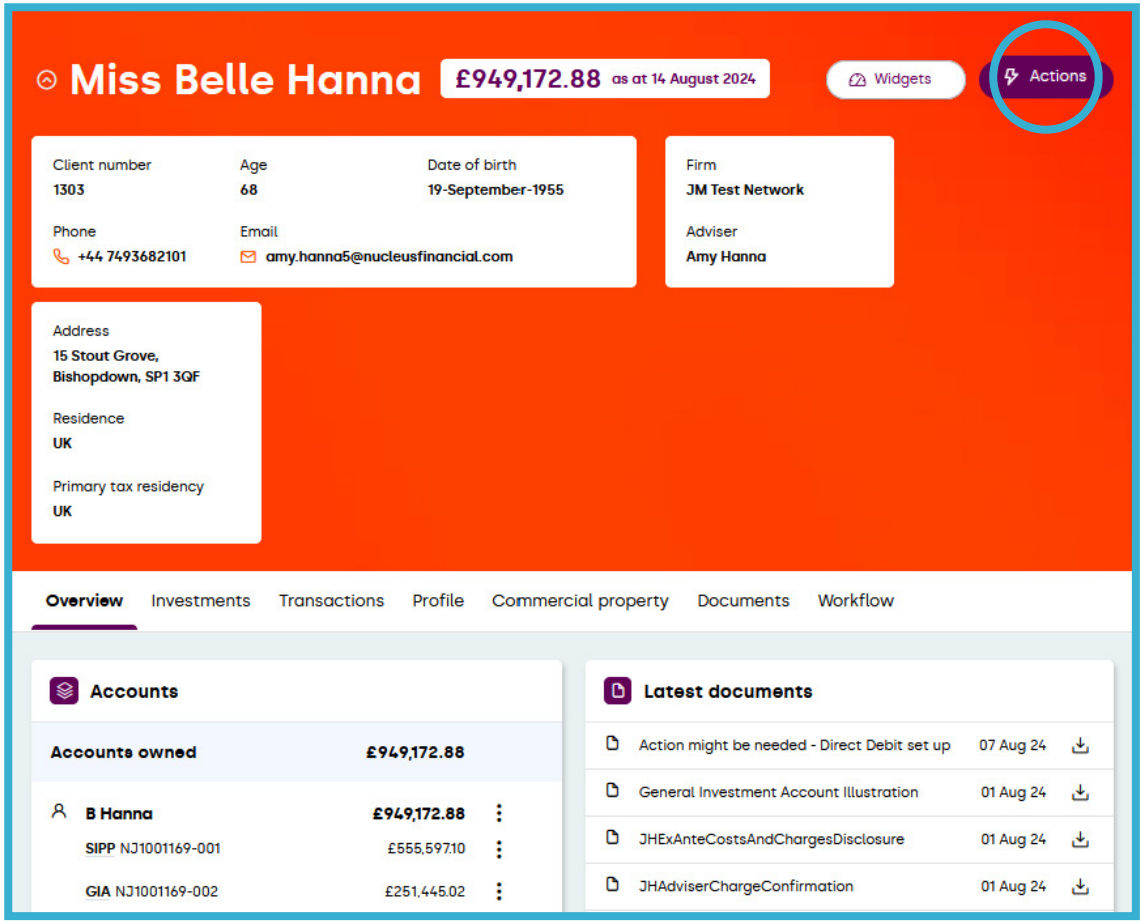
This guide is demonstrated using an adviser user with master user role permissions.

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

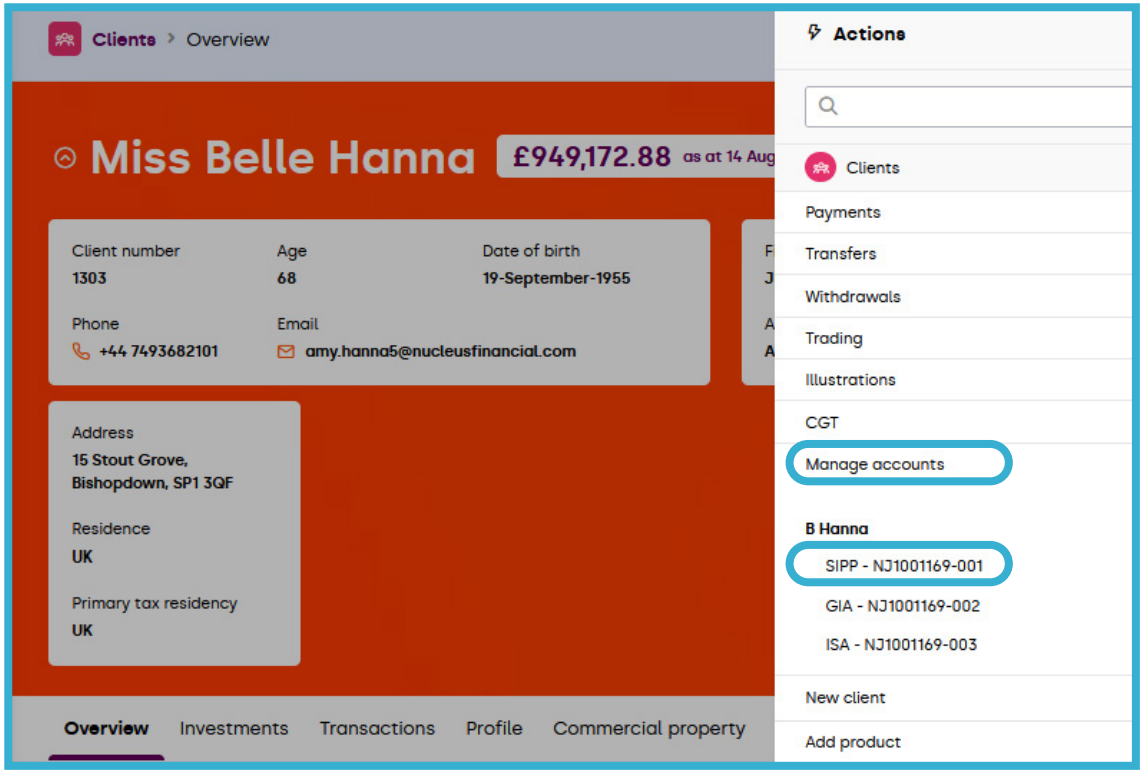
Key messages

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.

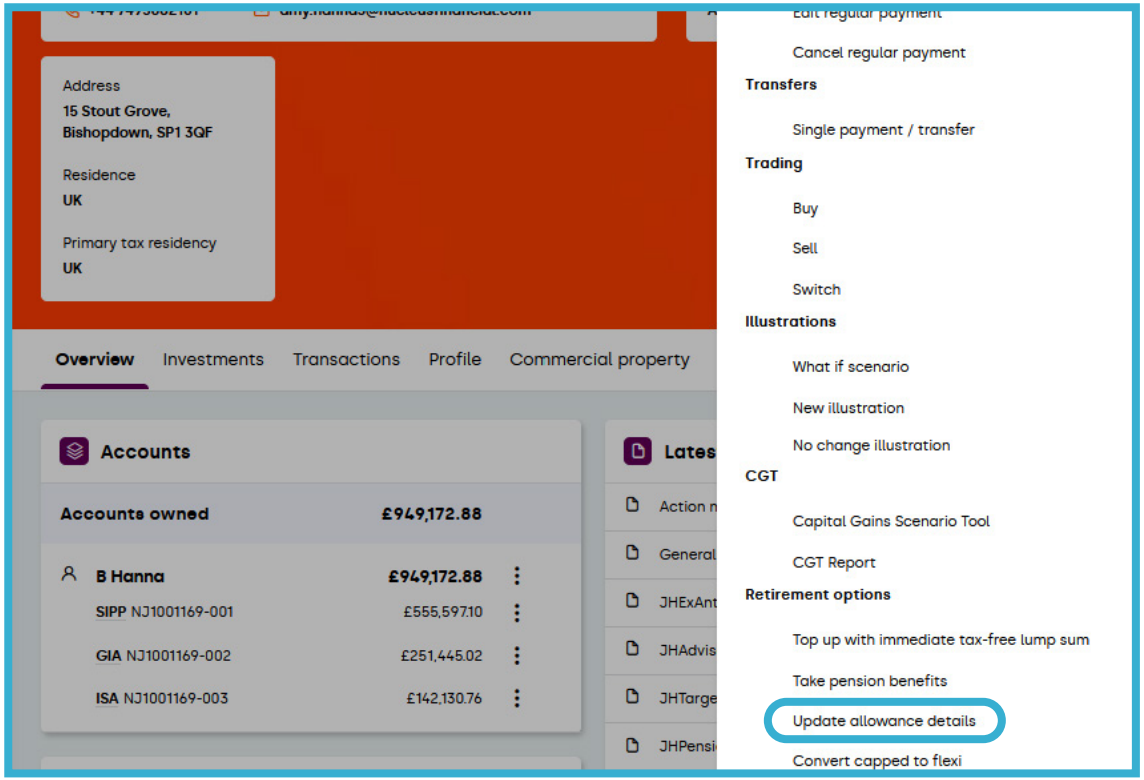
From the client's home page, select the **'Actions'** button.



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



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



Allowance details

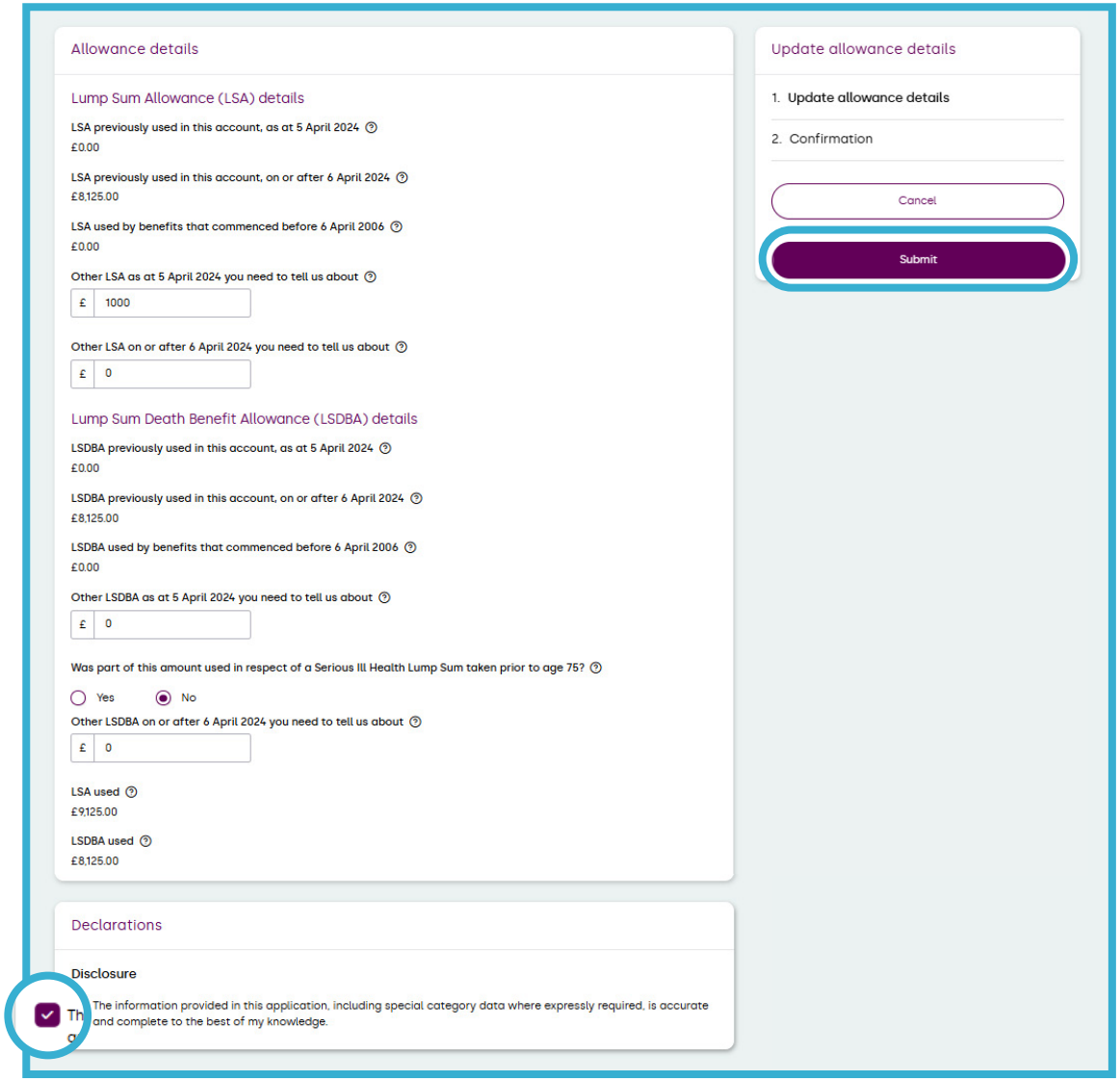
Confirm all applicable allowance details.

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

Declaration

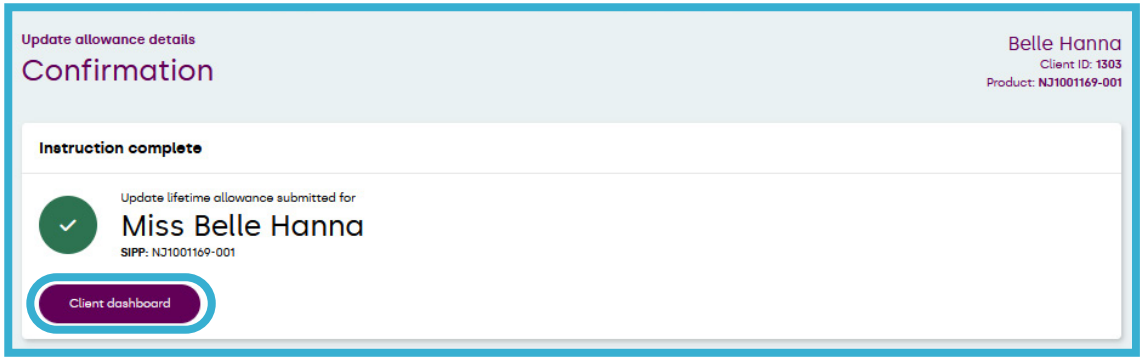
Read through the declaration and tick to confirm completion.

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



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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For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.

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