

For customers

Our new
platform

nucleus^o
platform

How to add a
single additional
contribution/transfer



🕒 3 minute read

How to add a single additional contribution/transfer

How to add a single additional contribution	3
Payments in	4
Transfers in (cash)	5
Transfers in (re-registered assets)	6
Investment selection	7
Review	8
Documents and declarations	9
Confirmation	10

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 add a single additional contribution



Before following this guide please ensure you've created an online account.

This process is the same for both a GIA and ISA. This guide follows the steps for a GIA.

Once you've logged into your account, you'll arrive at the Overview page

To add a single additional contribution, select the 'Actions' button in the top righthand corner of the screen. Then select 'Payments', then 'Single payments/transfers'.

Select the account to add your single additional contribution or transfer to.

My account > Overview

Miss Christine Client £159,283.46 as at 2 Jun 2026

Overview Accounts Investments Transactions Profile Commercial property Documents

Accounts owned £159,283.46

Account	Balance
C Client	£0.00
Nucleus ISA NJ1002508-001	£0.00
C Client	£159,283.46
Nucleus GIA NJ1002427-001	£10,227.91
Nucleus SIPP NJ1002427-002	£63,532.57
Nucleus GIA	

Top investments

Investment	Percentage	Value	Change
GBPCash	65.41%	£104,202.18	↑ £0.00
7IM AAP Adventurous C Acc	19.28%	£30,703.26	↑ £6,053.26
7IM AAP Balanced C Acc	9.51%	£15,149.73	↑ £2,149.73
7IM AAP Moderately Cautious C Acc	5.65%	£8,994.53	↑ £994.53
7IM AAP Moderately Adventurous C Inc	0.15%	£233.76	↑ £33.76

Performance

Change of 0% Since 21st of May

Performance calculations are cumulative from 21st of May. The performance shown above gross of fees and tax internal rate of return

View performance >

Documents

Actions

- My account
- Payments
 - Single payments/transfers
 - Add regular payment
 - Edit regular payment
 - Cancel regular payment
- Transfers
- Withdrawals
- Trading
- Illustrations
- Manage accounts
- Add product

Miss Christine Client £159,283.46 as at 2 Jun 2026

Overview Accounts Investments Transactions Profile Commercial property Documents

Top investments

Investment	Percentage	Value	Change
GBPCash	65.41%	£104,202.18	↑ £0.00
7IM AAP Adventurous C Acc	19.28%	£30,703.26	↑ £6,053.26
7IM AAP Balanced	9.51%	£15,149.73	

Performance

Change of 0% Since 21st of May

Account H McKenzie (NJ1003039)

Actions

- Back
- Single payments/transfers
- H McKenzie NJ1003039
- Jenny McKenzie NJ1002921
- C Client NJ1002508
- C Client NJ1002427

Payments in

Select the product you want to add your single contribution and transfers into.



You must sign a transfer authority form for each transfer.

Under the heading 'Payments in', go to 'Single payments in' and select 'Yes'



The single payment in should be made by bank transfer using the details shown here.

Please ensure the payment reference number is included.

If no payment reference is used or is incorrect this will delay the cash being made available in your account.

Add the single payment amount and the 'Payment method' will default to 'Bank transfer'

Transfers in (cash)

Select 'Yes' if you want to add a transfer in.

Add the 'Transferring scheme' name and search for the provider or add it manually.

Check if an electronic transfer is supported for this transferring scheme.

Complete the 'Transfer type', either 'Cash' or 'Re-register assets'.

For cash transfers add the 'Estimated current value'.



You must sign a transfer authority form for each transfer.



Providing the account number will help to process the transfer

Select if this is this a 'Full' or 'Partial' transfer.

Click the plus next to 'Add another transfer', to add another transfer.

Transfers in (Re-registered assets)

If your transfer type is **'Re-register assets'** continue to add the transfer details and search for the 'Assets to be re-registered'.

Once the assets have been selected add the 'Quantity in units'.

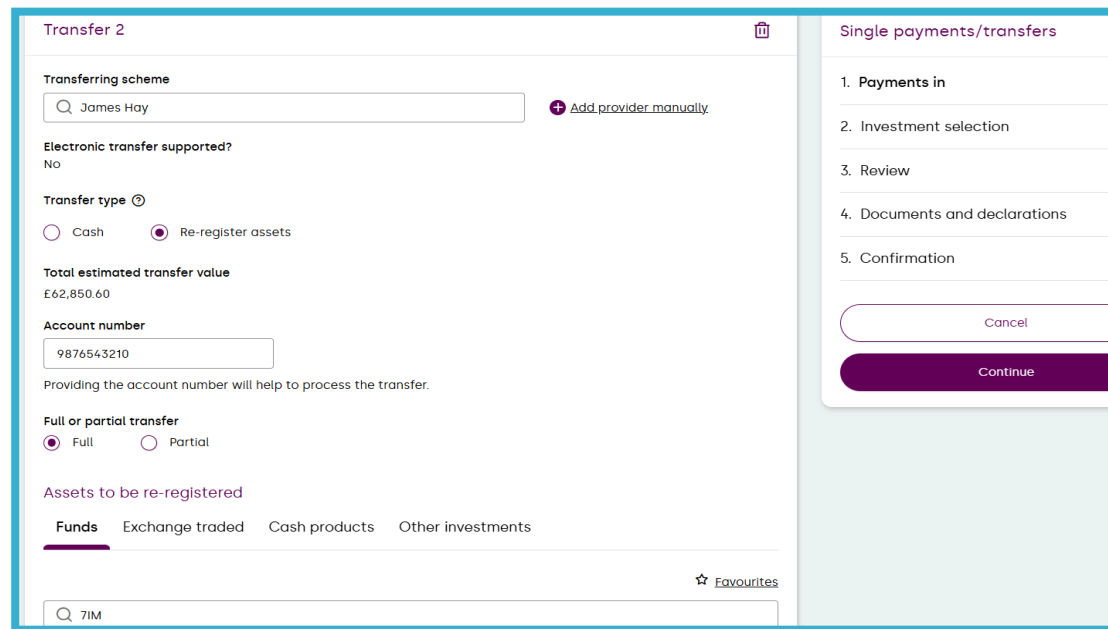
 The 'Total estimated transfer value' will pre-populate once the assets and units have been added.

For full transfers, if more units are held for this account number than specified, we'll transfer all the units.

Enter the 'Cash portion of the transfer'.

Select 'Source of wealth' from the dropdown list.

Then select **'Continue'**



Transfer 2

Transferring scheme
James Hay [+ Add provider manually](#)

Electronic transfer supported?
No

Transfer type 
☐ Cash ☒ Re-register assets

Total estimated transfer value
£62,850.60

Account number
9876543210
Providing the account number will help to process the transfer.

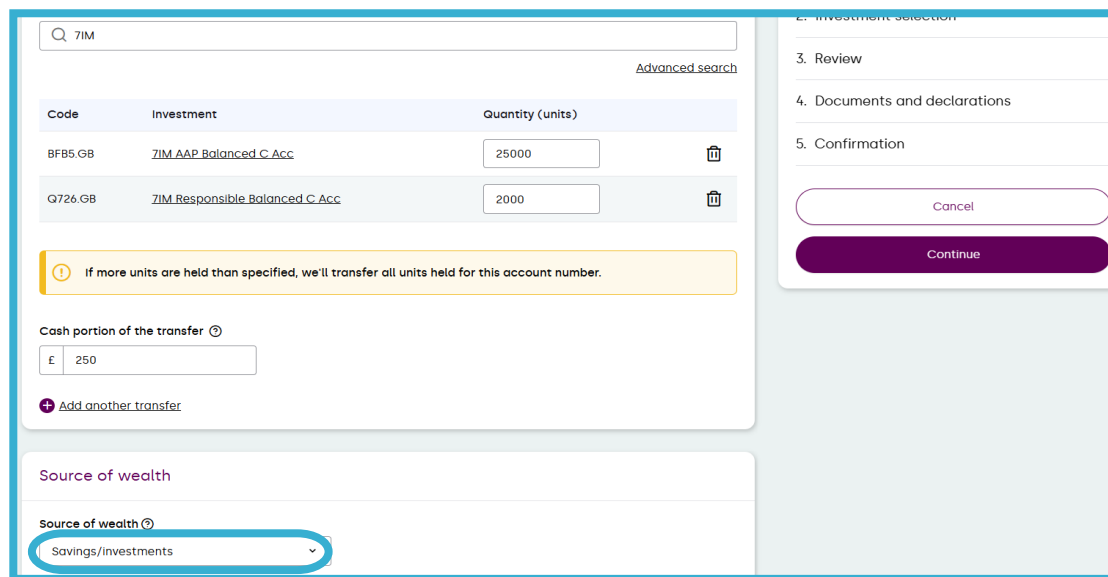
Full or partial transfer
☒ Full ☐ Partial

Assets to be re-registered
[Funds](#) [Exchange traded](#) [Cash products](#) [Other investments](#)

[Favourites](#)

Search: 7IM

Single payments/transfers
 1. Payments in
 2. Investment selection
 3. Review
 4. Documents and declarations
 5. Confirmation
[Cancel](#)
[Continue](#)



Search: 7IM [Advanced search](#)

Code	Investment	Quantity (units)
BFB5.GB	7IM AAP Balanced C Acc	25000
Q726.GB	7IM Responsible Balanced C Acc	2000

 If more units are held than specified, we'll transfer all units held for this account number.

Cash portion of the transfer 
 £ 250

[+ Add another transfer](#)

Source of wealth
 Source of wealth 
 Savings/Investments

2. Investment selection
 3. Review
 4. Documents and declarations
 5. Confirmation
[Cancel](#)
[Continue](#)

Investment selection

Do you want to trade in investments already held?

Key messages

Selecting 'Use current assets' will show your current investment holdings without a percentage allocation for each investment.

if an investment you hold can't be purchased as part of this instruction, you won't be able to enter a value against it.

If you want to 'Use current assets' these will show under the 'Investment choices' headings. Add the percentages for each investment, totalling 100%.

If you select, 'No' search for your investment choices under the relevant headings. Add the percentages for each investment, totalling 100%.

Then select 'Continue'.

Single payment / transfer

Christine Client
Client ID: 2798
Product reference: N31002427-001
Product: Nucleus GIA

Investment selection

Do you want to trade in investments already held?

☒ Use current assets ☐ No

Funds Exchange traded Cash products Other investments

★ Favourites

Q

Advanced search

Investment choices

Investment name	Single + Cash transfer
Cash	5 %
ZIM AAP Adventurous C Acc	50 %
ZIM AAP Moderately Adventurous C Inc	45 %
Total	100%

Single payments/transfers

1. Payments in
2. Investment selection
3. Review
4. Documents and declarations
5. Confirmation

Cancel

Continue

Single payment / transfer

Christine Client
Client ID: 2798
Product reference: N31002427-001
Product: Nucleus GIA

Investment selection

Do you want to trade in investments already held?

☐ Use current assets ☒ No

Funds Exchange traded Cash products Other investments

★ Favourites

Q

Advanced search

Investment choices

Investment name	Single + Cash transfer
BlackRock Absolute Return Bond D Acc	95 %
Cash	5 %
Total	100%

Single payments/transfers

1. Payments in
2. Investment selection
3. Review
4. Documents and declarations
5. Confirmation

Cancel

Continue

Review

Review the single payment and transfer details for accuracy.

Use the 'pencil' icon to make any necessary changes.

Once you are happy that the details are correct, Select '**Continue**'.

nucleus

Single payment / transfer

Christine Client

Client ID: 2798

Product reference: NJ1002427-001

Product: Nucleus GIA

Review

Nucleus GIA

Single payments in

Your single payment

Amount

£50,000.00

Transfer 1

Transferring scheme

James Hay

Electronic transfer supported

No

Transfer type

Cash

Estimated current value

£25,000.00

Transferring account number

1234567890

Full or partial transfer

Full

Single payments/transfers

1. Payments in

2. Investment selection

3. Review

4. Documents and declarations

5. Confirmation

Cancel

Continue

Transferring scheme

James Hay

Electronic transfer supported

No

Transfer type

Re-register assets

Total estimated transfer value

£62,850.60

Transferring account number

9876543210

Full or partial transfer

Full

Cash portion of the transfer

£250.00

Transfer 2 assets to be re-registered

Investment

Valuation

Quantity (units)

7IM AAP Balanced C Acc

£58,295.00

25000

7IM Responsible Balanced C Acc

£4,305.60

2000

Total

£62,600.60

27000

Investment selection

Investment

Allocation

Cash

5%

7IM AAP Adventurous C Acc

50%

7IM AAP Moderately Adventurous C Inc

45%

Total

100%

1. Payments in

2. Investment selection

3. Review

4. Documents and declarations

5. Confirmation

Cancel

Continue

Documents and declarations

Documents to be completed and sent to us by secure message and supporting documents can be downloaded here.

Confirm the declarations by ticking 'Confirm all'.

Then select 'Submit'.

The screenshot shows the 'Documents and declarations' page for Christine Client (Client ID: 2798, Product reference: NJ1002427-001, Product: Nucleus GIA). The page is titled 'Single payment / transfer' and 'Documents and declarations'. It features two main sections: 'Documents and declarations' and 'Single payments/transfers'. The 'Documents and declarations' section lists documents to be completed and sent to us by secure message, including 'Transfer-Form', 'Ex-Ante Costs and Charges Disclosure', 'Target Market Information', and 'Key Investor Information Document'. It also lists supporting documents, including 'GIA Illustration'. The 'Single payments/transfers' section shows a progress bar with five steps: 1. Payments in, 2. Investment selection, 3. Review, 4. Documents and declarations, and 5. Confirmation. The 'Documents and declarations' step is currently active. At the bottom, there are 'Cancel' and 'Submit' buttons.

The screenshot shows the 'Declarations' page for Christine Client. It features a list of declarations to be confirmed, each with a checkbox. The declarations are grouped into 'Investments' and 'Transfers'. The 'Investments' section includes declarations about Nucleus's responsibility, authorization to deal directly with providers, understanding of trading policy, acceptance of Nucleus's assessment, and confirmation of eligibility. The 'Transfers' section includes declarations about the transferring provider's responsibility and acceptance of costs and losses. At the bottom, there is a 'Confirm all' button. The 'Single payments/transfers' section on the right shows a progress bar with five steps: 1. Payments in, 2. Investment selection, 3. Review, 4. Documents and declarations, and 5. Confirmation. The 'Documents and declarations' step is currently active. At the bottom, there are 'Cancel' and 'Submit' buttons.

Confirmation

A message will appear confirming that your 'Single payment/transfer' instruction has been completed.

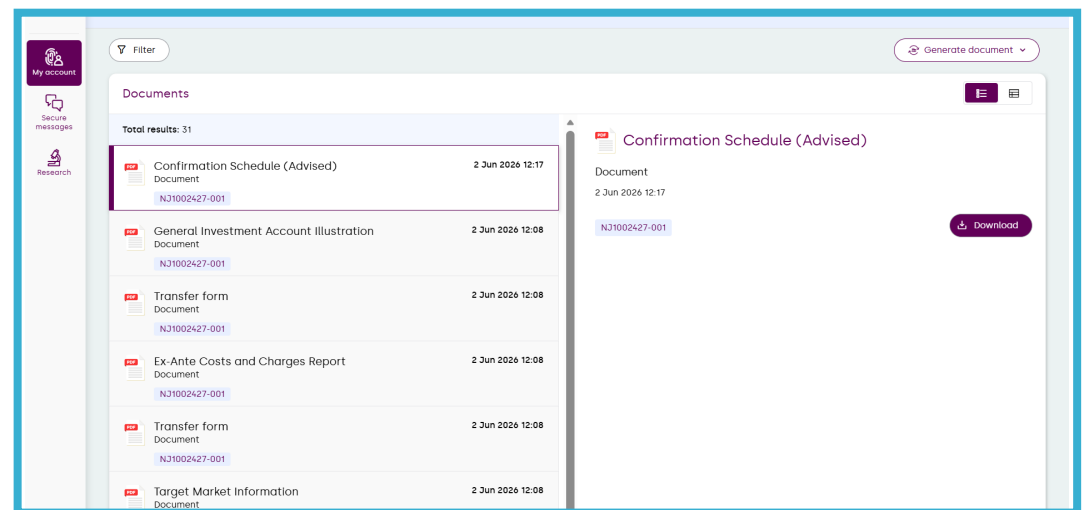
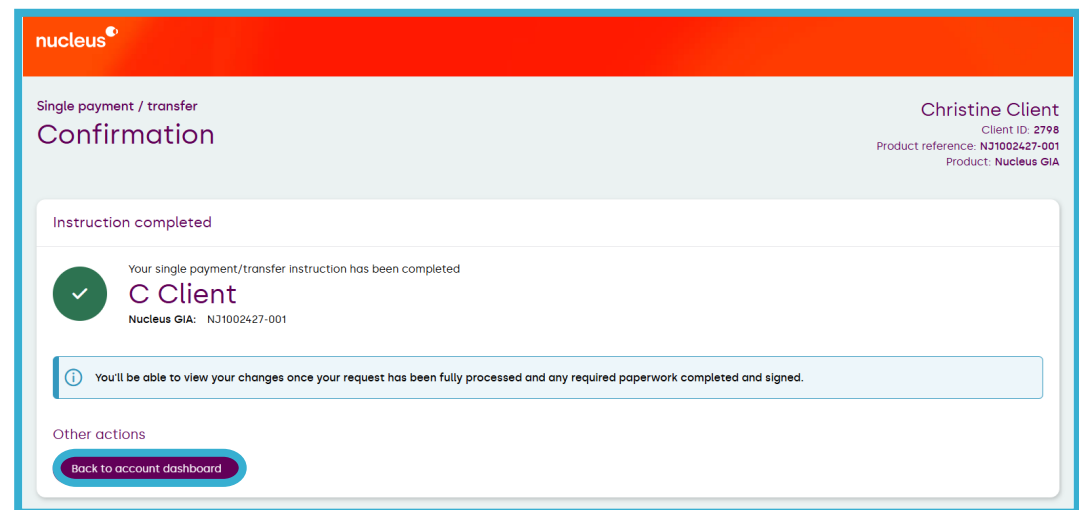


Your request will be fully processed once we're in receipt of the completed and signed paperwork.

From here you can go 'Back to account dashboard'.

After submission, the supporting documents and illustration are under the '**Documents**' heading on your account dashboard and can be downloaded here.

If you have any questions, please contact us on 03455 212 414.



 03455 212 414

 ask@nucleusfinancial.com

 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 Typetalk service on 18001 03455 212 414.

"Nucleus" is the trading name for Nucleus Financial Platforms Limited (NFPL) (registered in England, number 06033126), Nucleus Group Services Limited (NGSL) (registered in England, number 02538532); James Hay Services Limited (JHS) (registered in Jersey, number 77318); James Hay Administration Company Limited (JHAC) (registered in England, number 04068398); James Hay Pension Trustees Limited (JHPT) (registered in England, number 01435887); James Hay Wrap Managers Limited (JHWM) (registered in England, number 04773695); James Hay Wrap Nominee Company Limited (JHWNC) (registered in England, number 07259308); Nucleus Financial Services Limited (NFS) (registered in England, number 05629686). NFPL, NFS, NGSL, JHAC, JHPT, JHWM, JHWNC have their registered office at Suite B & C, First Floor, Milford House, 43-55 Milford Street, Salisbury, SP1 2BP. JHS has its registered office at Aztec Group House, IFC6, The Esplanade, St Helier, Jersey, JE4 0QH. JHAC, JHWM and NFS are authorised and regulated by the Financial Conduct Authority. NFPL, NGSL, NFS, JHWM, JHPT, JHAC and JHS are members of a VAT group with VAT registration number 514 0358 80. All companies are wholly owned subsidiaries of NFPL. Further details of the Nucleus Group can be found at nucleusfinancial.com. (12/25)