

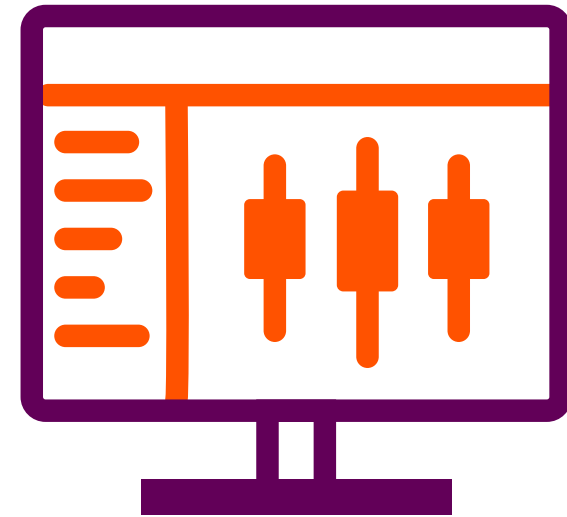
For advisers

Our new
platform

nucleus^o platform

How to register an upgrading user

 2 minute read



How to register an upgrading user

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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.

Logging into James Hay Online

To register an upgrading user (a user with all plans migrating onto the new platform), log into James Hay online secure portal.

When you've entered your log in details, you'll be redirected to the new registration page.

The screenshot shows the James Hay Online - Secure Portal interface. At the top left is the James Hay Partnership logo. Below it is a blue header bar with the text "James Hay Online - Secure Portal". The main content area is divided into two columns. The left column is titled "Login" and contains three input fields: "Username", "Password", and "Passcode". Below the "Password" field is a "Show password" link, and below the "Passcode" field is a "Show passcode" link. At the bottom of the login box is an orange "Login" button and a "Forgot password/passcode?" link. The right column is titled "Online Registration" and contains two buttons: "Investor" and "Adviser". Below the "Investor" button is the text "Register to manage your existing products." Below the "Adviser" button is the text "Why register? Register to apply, illustrate or manage your existing products - find out more". At the bottom of the page is a "Please note:" section with two bullet points: "• Your password and passcode are case-sensitive." and "• By logging in you are agreeing that you have read and understood our [Legal Information](#)."

Enter your contact details.

Select **'Submit'**.

The screenshot shows the 'Client Registration' page with the 'nucleus' logo in the top left. The form is titled 'Client Registration' and contains a 'Contact details' section. This section includes an 'Email address' field with a cursor, a 'Confirm email address' field, and a 'Mobile Number' section. The 'Mobile Number' section has three sub-fields: 'Phone' (a dropdown menu with 'Mobile' selected), 'Country' (a dropdown menu with 'UK (+44)' selected), and 'Phone number' (an empty text input field). Below this is a 'Confirm Mobile Number' section with identical 'Phone' and 'Country' dropdowns and an empty 'Phone number' field. At the bottom of the form are two buttons: 'Cancel' and 'Submit'.

A confirmation of registration will appear.

Keep an eye on your emails for your log instructions.

Selecting **'Back to login page'** will take you to the platform log in page.

The screenshot shows a confirmation page titled 'Registration details submitted'. Below the title is a message: 'Thanks. We're sending you an email to confirm your new username and enable you to set up a new password. Please keep a note of them somewhere safe.' At the bottom of the page is a button labeled 'Back to login page'.

Registration email

Select the hyperlink 'here' on the email.

Key information

The link on the email is valid for 5 days, after 5 days you'll need to contact us to complete your registration.



Dear Mr Pike

You've registered for online access to the Nucleus Platform.

1. Please click [here](#) to complete your registration and activate your account. The registration link will be valid for 5 days, after that you'll need to contact us on the number below to complete your registration. The first time you log in your username will appear on screen, and you'll be asked to create a new password.
2. Once your password is set up and confirmed, you'll receive a one-time passcode via SMS. Please enter the passcode to complete the setup of your online account.
3. You'll be asked to review and accept our platform Terms of Use policy. You won't be able to access the service until you have done this.

If you haven't requested online access to your Nucleus Platform account, or have any questions, please call us on 03455 212 414 or email us at ask@nucleusfinancial.com.

Customer Service Team

This email and any attachments to it are confidential and may be privileged. If you're not the intended recipient of this e-mail, any disclosure, distribution, copying or use of it (including attachments) is strictly prohibited, and you should notify the sender immediately and delete it (including attachments) from your system. E-mails aren't always secure and may be intercepted or changed. We don't accept liability if this happens. If you believe that this e-mail has been interfered with, please contact the sender another way. We don't accept liability for any losses caused by any virus contained in this e-mail or its attachments. This message doesn't create or change any contract. We don't accept service of court or tribunal proceedings by e-mail without prior written agreement.



Keep note of the username displayed. You'll need this to log in to the platform. If you need your username, contact the master user at your firm.

Enter your new password into both fields.



Your password must meet these requirements:

- Minimum eight characters, maximum 50
- Contains at least two numbers (0 - 9)
- One upper case letter
- Remaining characters can be lower case, but not special characters
- Does not repeat the same character more than twice in succession
- Password history is set to record last 13 passwords

Select **'Save'**.

Register

Your username is:
dpike113
Please keep a note of this somewhere safe

Please enter your chosen password below and confirm it.

New password

[Show password](#)

Confirm new password

[Show password](#)

Your password needs to meet these requirements:

- Password length is between 8 and 50 characters
- Contains 2 or more digits
- Contains 1 or more upper case letters
- Contains 1 or more lower case letters
- Does not contain any special characters
- Does not repeat the same character more than twice in succession
- Is not one of the 13 most recently used passwords

Save

Contact details

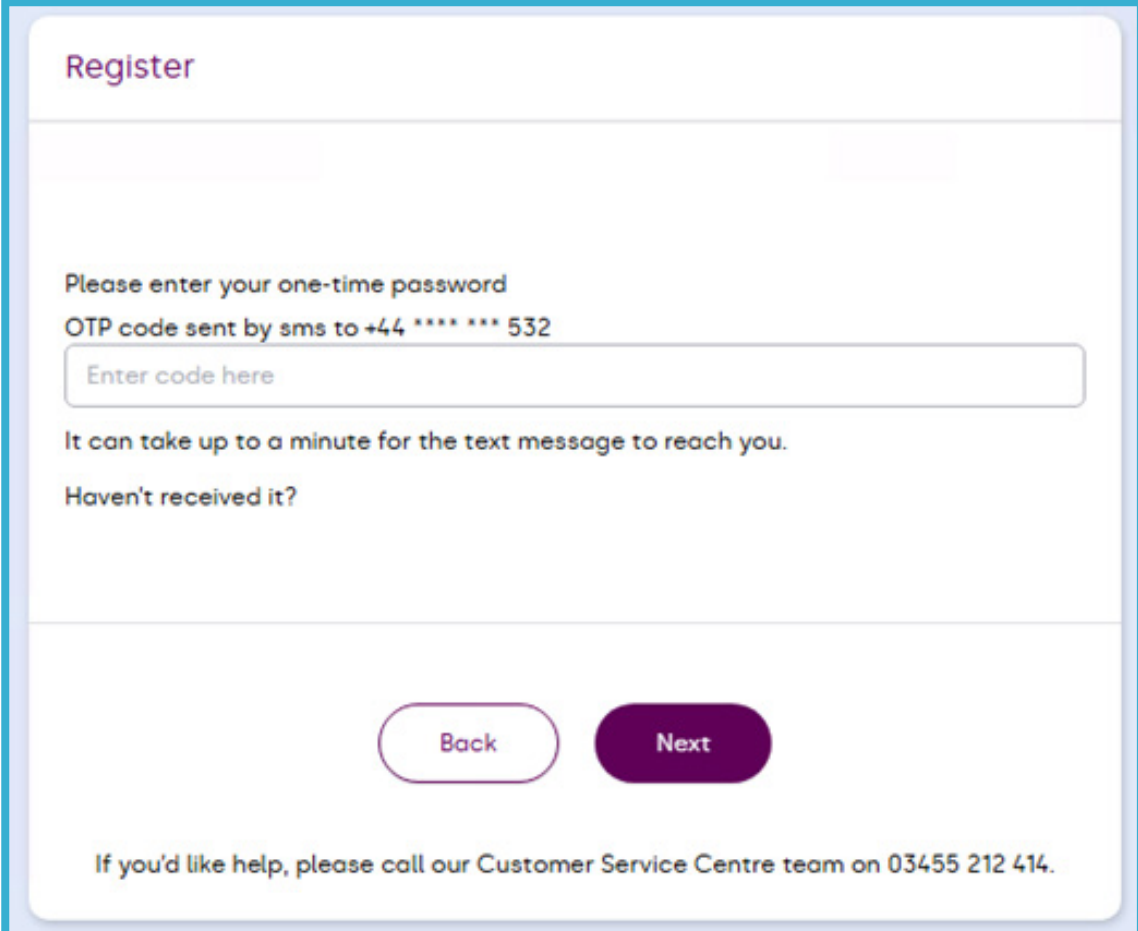
Your email is: [REDACTED]

Your mobile number is: [REDACTED]

A one-time password (OTP) code will be sent via SMS to the phone number you've provided.

Enter the OTP code.

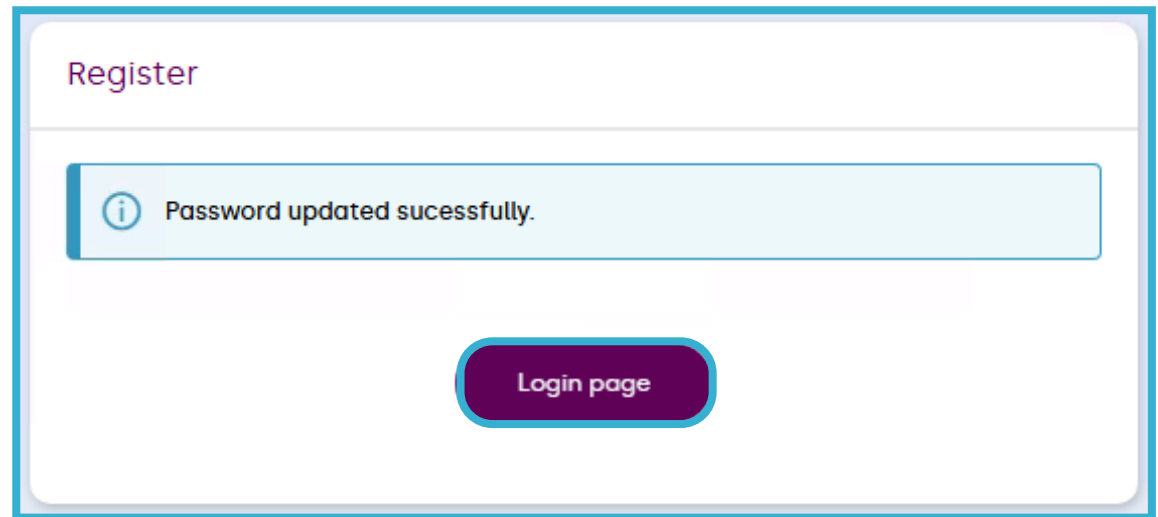
Select '**Next**'.



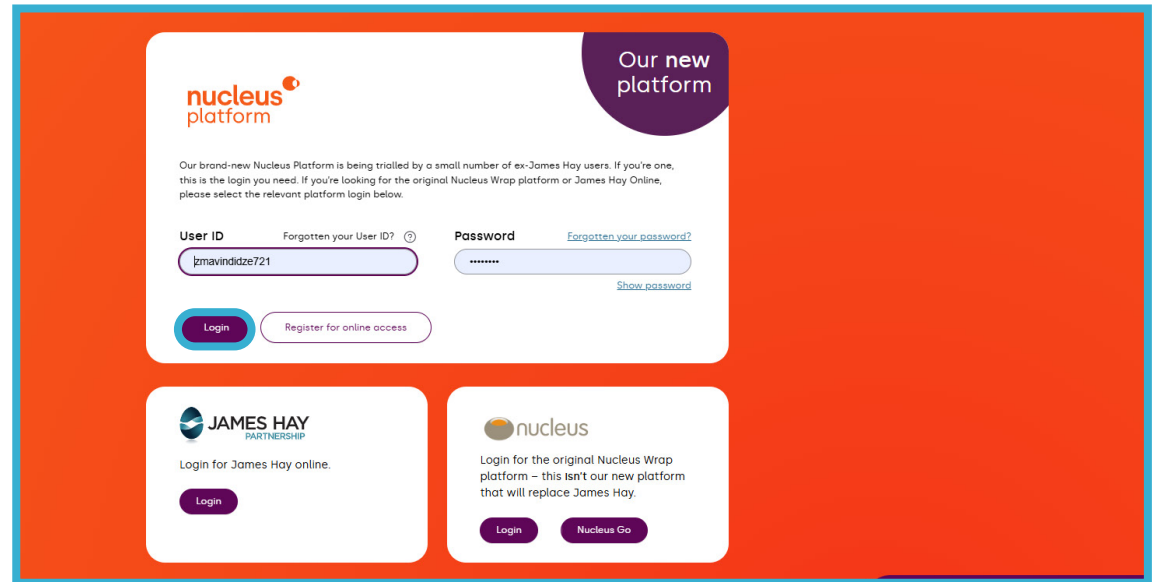
The screenshot shows a mobile registration interface. At the top, the word "Register" is displayed in a purple font. Below this, there is a large, empty white rectangular area. The text "Please enter your one-time password" is followed by "OTP code sent by sms to +44 **** * 532". A text input field with the placeholder "Enter code here" is provided. Below the input field, it says "It can take up to a minute for the text message to reach you." and "Haven't received it?". At the bottom, there are two buttons: a white "Back" button with a purple outline and a solid purple "Next" button. At the very bottom, a line of text reads "If you'd like help, please call our Customer Service Centre team on 03455 212 414."

Your registration has been submitted successfully.

Select '**Login page**', to go to the platform log in page.



Enter your username and password.
Select '**Login**'.



You'll be presented with the new platform terms and conditions.

Read the terms and conditions, select 'I agree' to proceed.

Terms and conditions

Nucleus platform "Terms of use"

These Terms of use provide important information about the Nucleus platform online service (the "Service"). You should read them carefully before agreeing to these terms. If there is anything you don't understand, please contact us before proceeding.

Please note that you won't be able to access the Service until you have agreed to the Terms of use.

1. Login and security

Each user has unique login details which control their access to the Service.

As a user, you are responsible for making sure that you protect your login details and other security information. This includes:

- taking reasonable precautions to keep the information secret
- not sharing your login details with anyone or allowing anyone else to use your account
- never writing down your login details without disguising it
- not leaving your device logged on to the Service while unattended.

If you think your login credentials have been lost, stolen or misused, or may be compromised, you must notify us as soon as possible by emailing us on ES@N212.AE.

2. Data protection

For each online session, we may gather information relating to the identity of the user, the time of use, and the way in which the user has accessed the Service.

For full details of what to expect when we process your personal data, please refer to the Privacy Notice on our website or by emailing us on ES@N212.AE.

3. Information available

The Service provides access to details of the products that Nucleus customers hold on the platform, including those to which you are connected. This may be through a power of attorney or third party authority agreement, or products that you hold jointly with another user.

Where required, we use data supplied by third parties to provide relevant information via the Service. While we take steps to monitor this data, we cannot be held responsible for its accuracy.

Where you make updates to data via the Service, we will not accept responsibility for its accuracy.

We'll always make reasonable efforts to keep our records up to date. However, if you notice anything with the Service which you believe contains errors, please let us know immediately.

We won't accept any liability or any claims made by you, your adviser or another appointed representative for damages or loss arising from inaccurate records.

4. Instructions

Where instructions are submitted using the Service, we may refuse to act where such instructions are considered unclear, or if we doubt their authenticity. For example, this may happen if we suspect the instruction may pose us in breach of any legislation or law, or that it may relate to fraud or any other criminal act. If we refuse to act on your instruction, we'll notify you and, where permitted, explain the reason why we refused.

5. Additional users

We may grant separate online access to view, and/or operate, your Nucleus platform account to you, your adviser and any of your appointed representatives. It's your responsibility to keep us informed of changes to any of your representatives.

6. Revoking access

We reserve the right to revoke any online access for a customer, financial adviser and/or appointed representative as we consider appropriate. For example, this could be where there is a change to the access rights of a user or where we suspect that the security of an account has been compromised and we wish to protect your data and investments.

7. Availability/alienation of Service

Access to our Service depends on our own systems' availability, and that of third party systems. Please refer to the product's Terms and Conditions for details of how we may manage interruptions to the Service and how this may affect your use of it.

We may amend, extend or withdraw any elements of the Service at any time. We will notify you of changes to the Service if we believe them to be material changes.

Please select one of the options below:

I agree I do not agree

Nucleus is the trading name for Nucleus Financial Platforms Limited (NFL) (registered in England, number 0635720), Nucleus Group Services Limited (NGSL) (registered in England, number 02939952), James Hay Services Limited (JHS) (registered in Jersey, number 77978), James Hay Administration Company Limited (JHAC) (registered in England, number 04068898), James Hay Pension Trustees Limited (JHPT) (registered in England, number 04088887), James Hay Wines Managers Limited (JHWM) (registered in England, number 04775649), James Hay Wines Nominee Company Limited (JHWNCL) (registered in England, number 07291958), Nucleus Financial Services Limited (NFS) (registered in England, 08429684).

NFL, NGSL, NGSL, JHAC, JHPT, JHWM, JHWNCL have their registered office at Suite 9 & C, First Floor, Wilford House, 13-15 Wilford Street, Salisbury SP1 2BR.

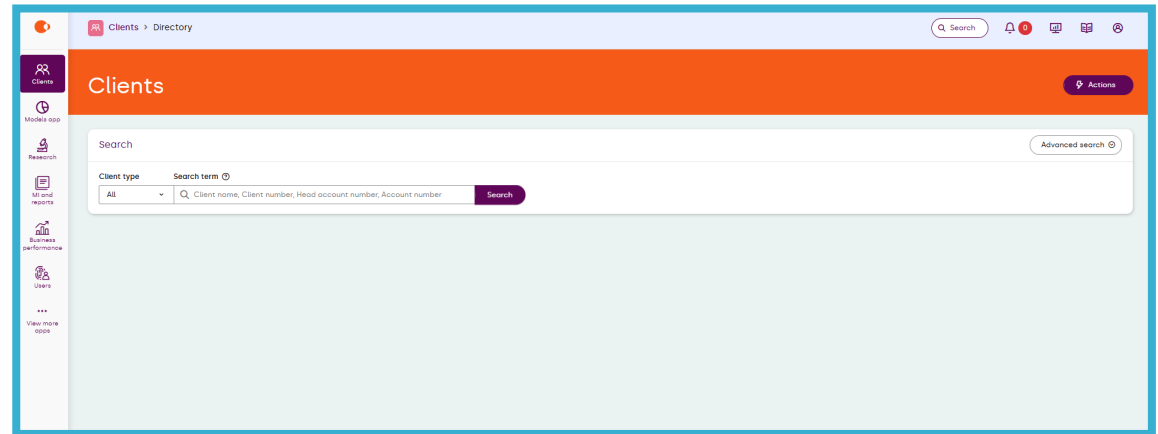
JHPT has its registered office at James Group House, POB, The Esplanade, St Helier, Jersey, ZE1 99N.


JHAC, JHWM and NFS are authorised and regulated by the Financial Conduct Authority.

NGSL, NFS, JHWM, JHPT, JHAC and JHWNCL are members of a VAT group with VAT registration number 214 0338 85.


All companies are wholly owned subsidiaries of NFL. Further details of the Nucleus Group can be found at pubs://www.nucleus.com (10/24).

You've successfully registered to the new Nucleus platform.



 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.

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