



# nucleus<sup>o</sup> platform

## ISA subscription form

Please complete this form in BLOCK CAPITALS and return it by:

- **post** to Nucleus, Suite 202 Warner House, 123 Castle Street, Salisbury, SP1 3TB, or
- **secure message** via your online account with us.

If you need any help, please call your Customer Support Team or our general enquiry number 03455 212 414.

### Using this form

Please use this form if you wish to make a single subscription, or start making regular subscriptions, to your ISA with Nucleus.

If you wish to amend an existing regular ISA subscription, please complete the **ISA Subscription Amendment form** available on our website [literature.nucleusfinancial.com](https://literature.nucleusfinancial.com).

Any money received will be held in your ISA cash account pending your investment instructions.

For the current tax year, the ISA allowance is £20,000. You can split the amount you pay into an ISA between a Cash ISA, a Stocks and Shares ISA, an Innovative Finance ISA and a Lifetime ISA as you choose, up to the £20,000 limit (up to a maximum of £4,000 for a Lifetime ISA).

**Please note: Nucleus ISAs are defined as Stocks and Shares ISAs under regulations. If you are in the process of transferring in a Stocks and Shares ISA that holds subscriptions for the current tax year, you will not be able to subscribe to your Nucleus ISA until that transfer has fully completed.**

### Section 1 - Personal details

Title

Forename(s)

Surname

Date of birth (DD/MM/YYYY)

ISA number

Permanent residential address

Postcode

Phone

Email

National Insurance number

I have never had a National Insurance number

## Section 2 - Payment details

I apply to subscribe to a Stocks and Shares ISA for the 2026/27 tax year, and each subsequent tax year in which I make a subscription.

### Lump sum payment

Lump sum subscription amount (£)

Do you wish to pay for your ISA subscription by moving cash from a GIA you hold with Nucleus?

If **Yes**, please provide your GIA number and we will transfer the amount stated above.

Alternatively, you can find the bank details of your ISA product cash account via your online portal account in order to make a payment.

## Section 3 - Investment selection

Please confirm if the contribution will be invested into current or new assets.

Do you want to trade in investments already held?

Yes, use my current investment selection

(Your contribution will be allocated in the same proportions as your existing selection)

No, I want to invest into new assets

(If selected, please complete the table below)

## Regular subscription payments

I wish to pay for my subscription by regular monthly payments of the following amount (£)

Date I wish the Direct Debit to start (DD/MM/YYYY)

This will be the day that the payment is taken each month, and must be between the 1st and 28th day of any month. Please complete the Direct Debit instruction at the back of this form, and allow up to 10 business days for us to set it up.

### Please note:

- Percentages must total 100%.
- If specifying amounts in pounds, please ensure they match the total contribution amount.
- If you are unsure which funds to select, please speak to your adviser before completing this selection.

Name of investment provider	Fund name	Policy/Plan number	Amount in £ sterling or %

## Section 4 - Customer declaration

I declare that:

- I have read and accepted the Nucleus Platform Services Terms and Conditions
- I am 18 years of age or over
- all subscriptions to be made belong to me
- I have not, and will not, subscribe more than the total subscription limit to a Cash ISA, a Stocks and Shares ISA, an Innovative Finance ISA and a Lifetime ISA within the same tax year
- I am resident in the UK for tax purposes and will inform Nucleus if I cease to be resident or,
- if not a UK resident, I either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pension) Act 2003 (Crown employees serving overseas) are treated as being performed in the UK, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Nucleus if this ceases to apply.

I authorise Nucleus as the ISA Manager to:

- hold my cash subscriptions, ISA investments, interest, dividends and any other rights or proceeds in respect of those assets and cash
- make any claims to relief from tax in respect of ISA assets on my behalf.


I confirm that the information provided in this application is true and complete and that I have answered the questions as fully as possible.

I accept it is a serious offence to make false statements and that the penalties are severe and could lead to prosecution.


Customer signature

Print name

Date (DD/MM/YYYY)

 03455 212 414

 [ask@nucleusfinancial.com](mailto:ask@nucleusfinancial.com)

 [nucleusfinancial.com](https://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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**ISA**

Please complete and send to:

Nucleus  
Suite 202 Warner House  
123 Castle Street  
Salisbury  
SP1 3TB

**Instruction to your Bank or Building Society to pay by Direct Debit**

Service User Number

**537262**

Name(s) of Account Holder(s)

Reference

Bank/Building Society Account Number

**Instruction to your Bank or Building Society**

Please pay Nucleus Financial Services Limited Direct Debits from the account detailed in this instruction, subject to the safeguards assured by the Direct Debit Guarantee.

Branch Sort Code

I understand that this instruction may remain with Nucleus Financial Services Limited and if so, details will be passed electronically to my Bank/Building Society.

Name and full address of your Bank/Building Society

To: The Manager Bank/Building Society

Signature(s)

Address

Address

Postcode

Date (DD/MM/YYYY)

This guarantee should be detached and retained by the Payer

**The Direct Debit Guarantee**



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit, Nucleus Financial Platforms group will notify you 10 business days in advance of your account being debited or as otherwise agreed. If you request Nucleus Financial Platforms group to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by Nucleus Financial Platforms group or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society
  - If you receive a refund you are not entitled to, you must pay it back when Nucleus Financial Platforms group asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.