For advisers

Our new platform

nucleus platform



Pension servicing

4 minute read

Pension servicing

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How to use this document

Important information will look like this.

Key messages

Key messages will look like this.



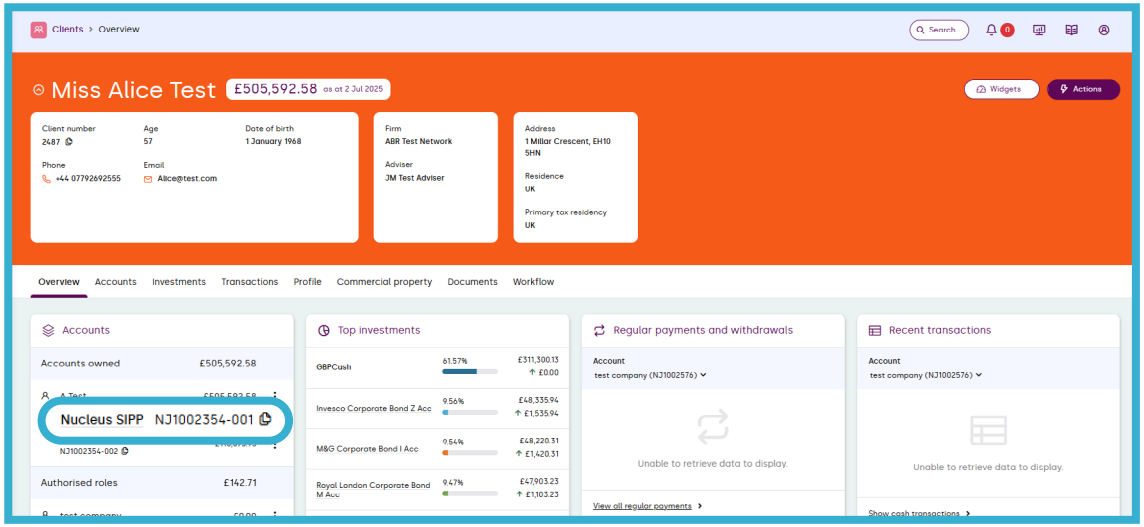
Useful info will look like this.

We recommend using the zoom function to view the details on the platform screens in this guide.

How to view pension arrangements and income

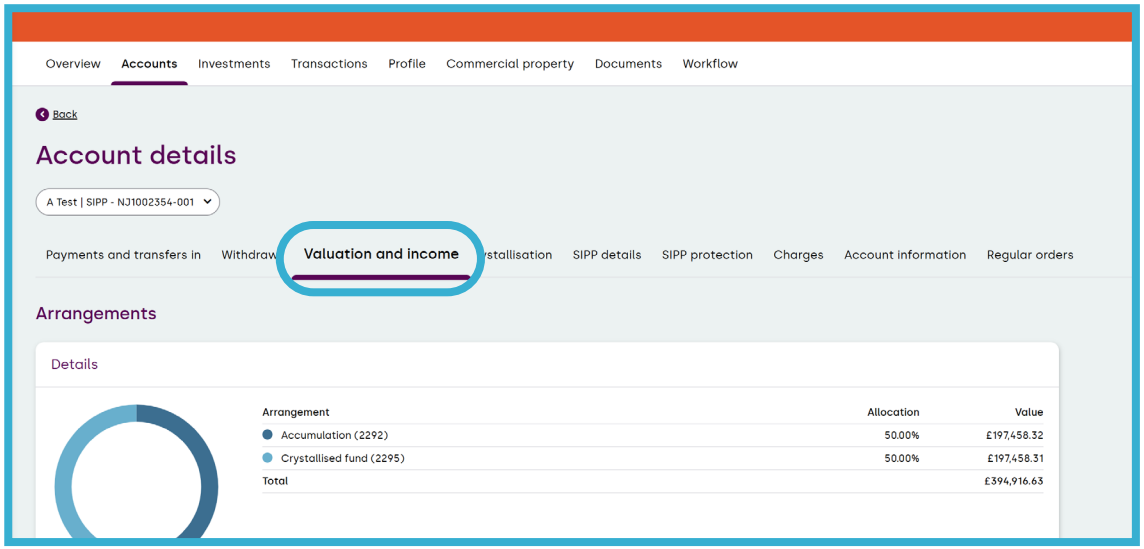
To proceed with pension servicing, you first need to find your client. You can refer to the guide on our website to help you search for your client.

Select **'Nucleus SIPP'** or **'Nucleus Flexi-SIPP'** account from the accounts widget.

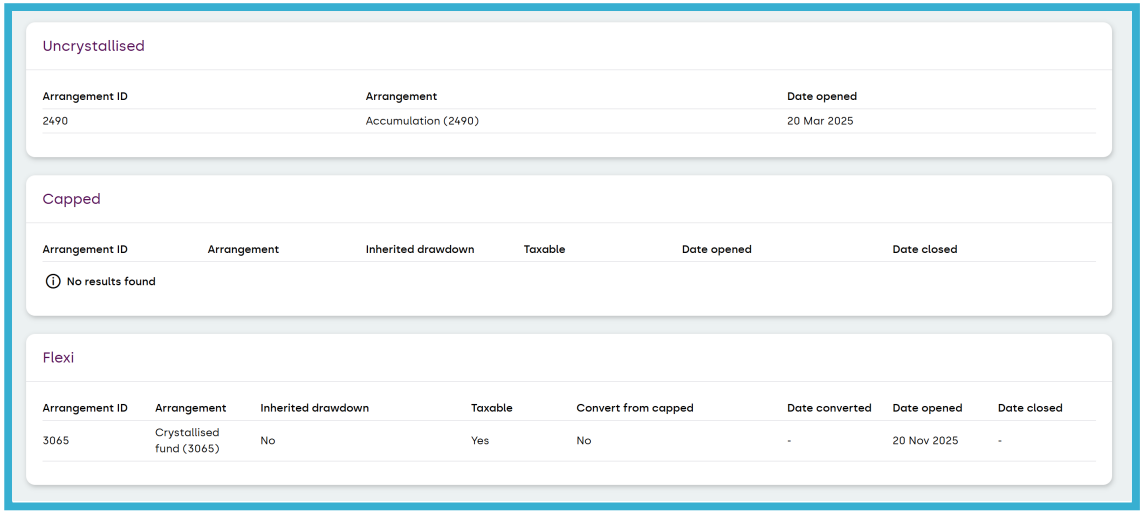


From the account details page select **'Valuation and income'**.

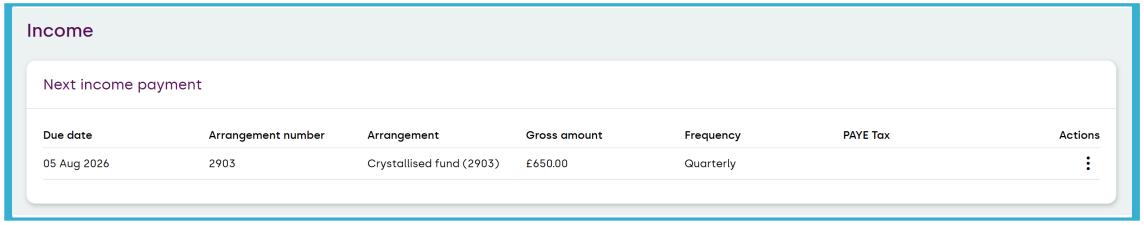
The percentage allocated and value of each arrangement is indicated here.



Scroll down the page to view further arrangement information.



If your client has an income arrangement, the income details are shown here.

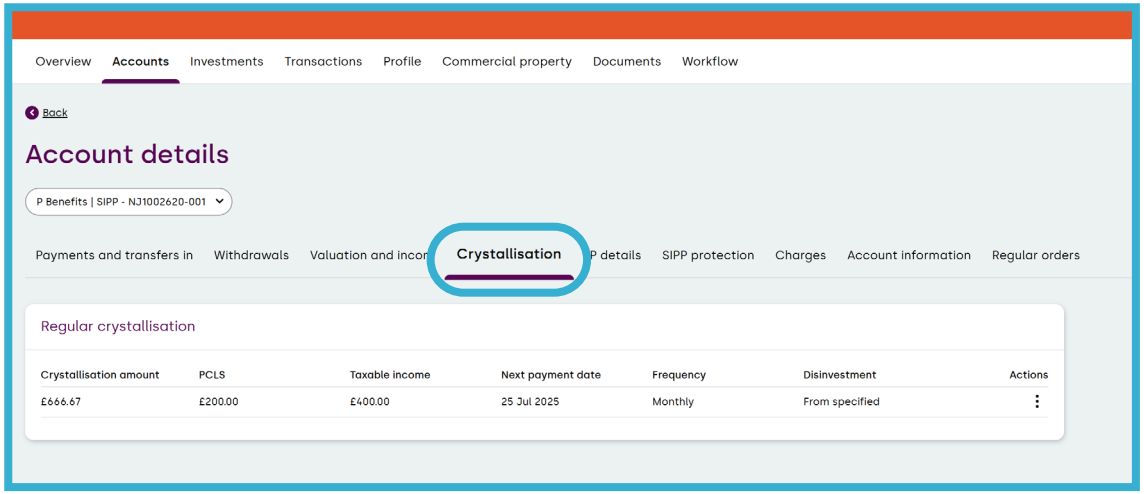


Regular crystallisations

From the account details page select **'Crystallisation'**.

Your client's crystallisation details will be shown here.

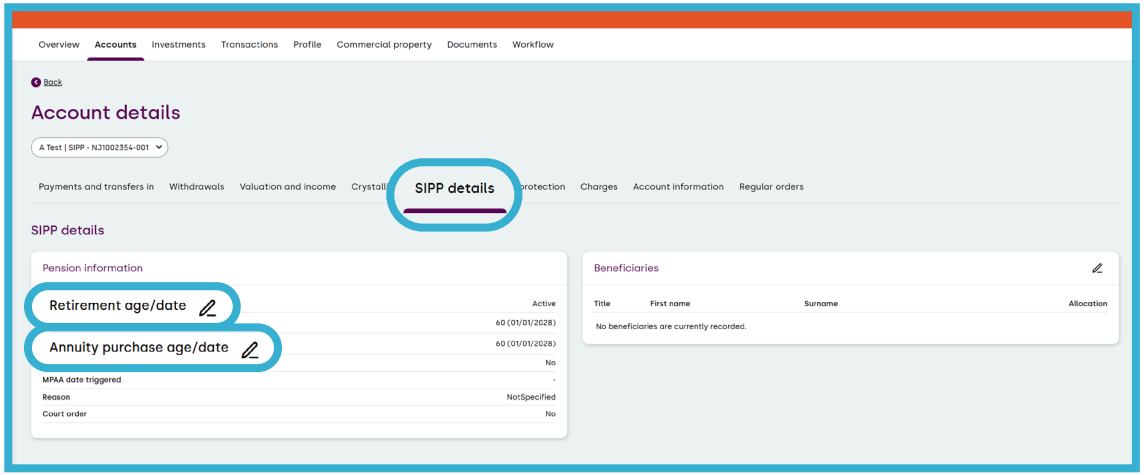
To edit or cancel regular crystallisations, you can refer to the guide on our website.



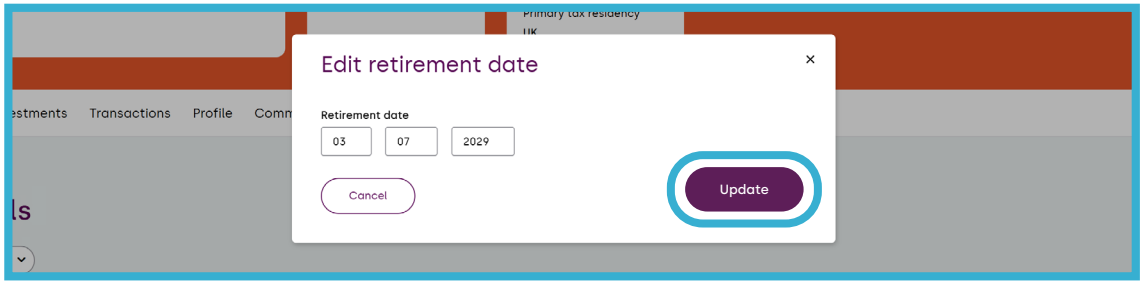
SIPP details

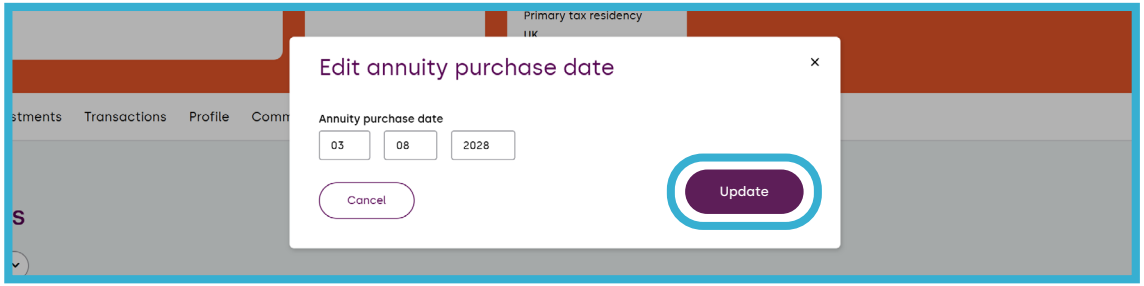
From the account details page select '**SIPP details**'.

To amend your client's **'Retirement age/date'** and **'Annuity purchase age/date'**, select the relevant pencil icon.



Enter the new information and select '**Update**'.

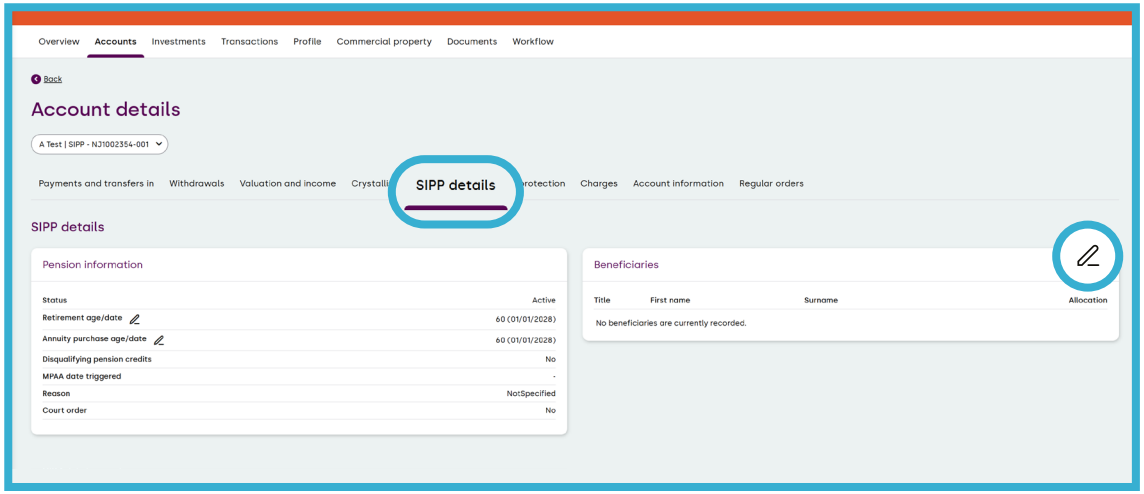




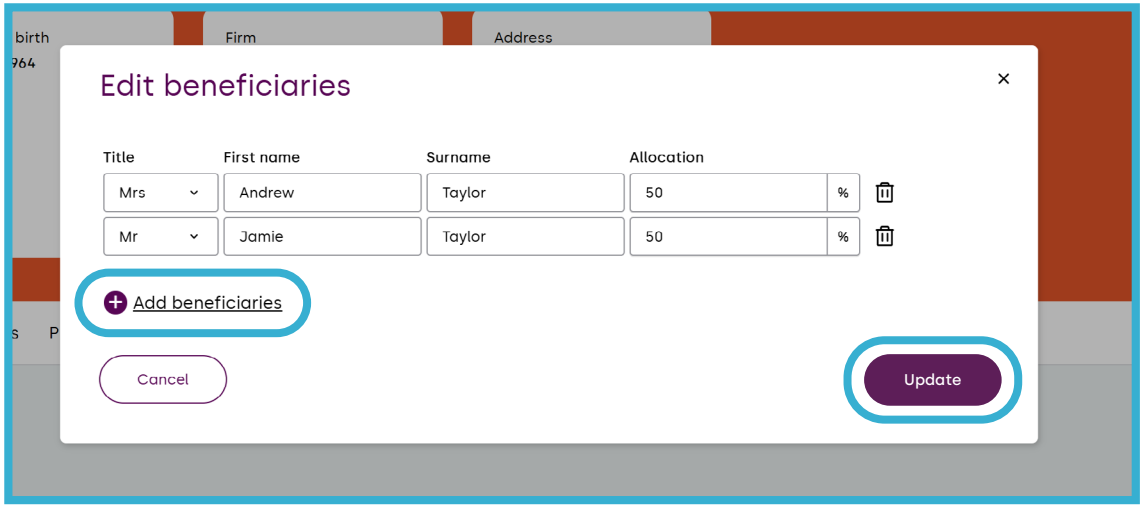
Adding and amending beneficiaries

From the account details page select **'SIPP details'**.

To add a new beneficiary, select the pencil icon on the beneficiaries section.



Select **'Add beneficiaries'**, to add multiple beneficiaries.



Key message

There's no limits to the number of beneficiaries that can be added.

Select the beneficiary's title from the drop-down list and enter the beneficiary's details.

Enter a percentage allocation for each beneficiary, ensuring the total equals 100%.

Key message

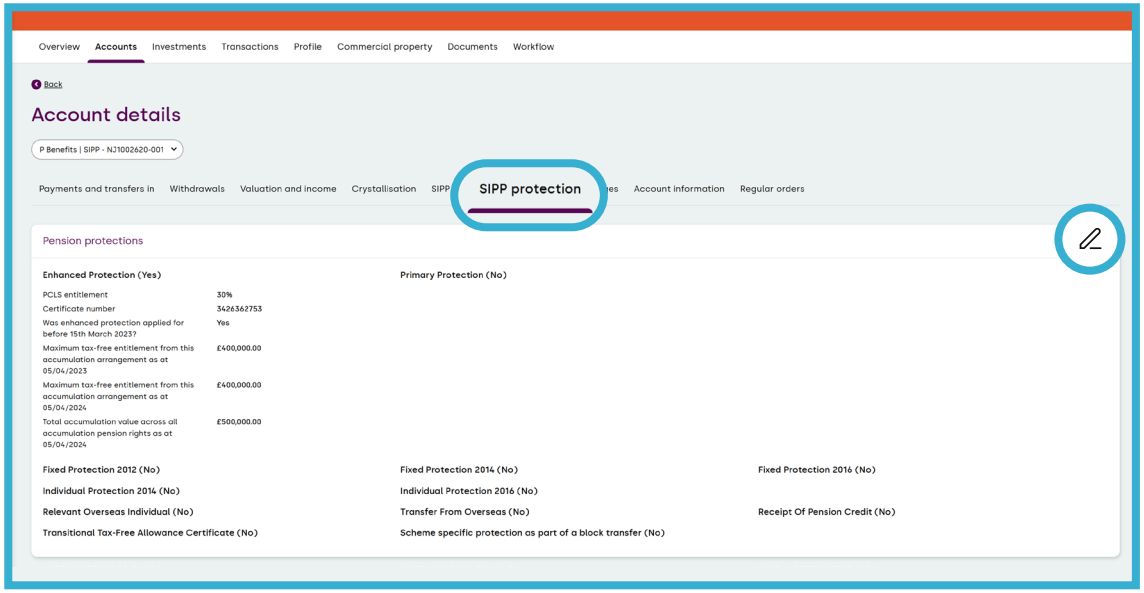
To delete the beneficiary, select the bin icon.

Once you're happy with the beneficiary details, select **'Update'**.

Pension protection

From the account details page select '**SIPP protection**'.

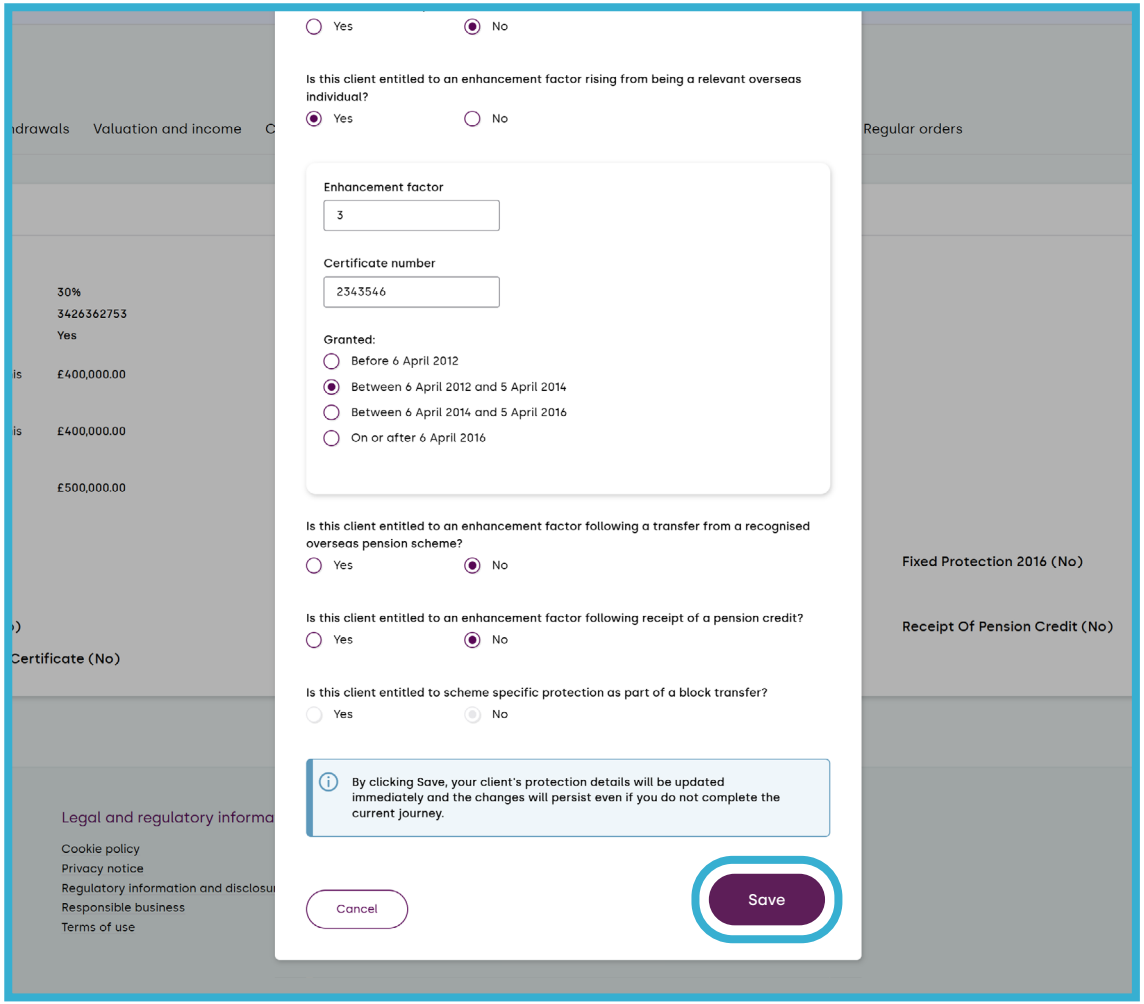
Select the pencil icon to add or edit your client's pension protection details.



The certificate number and protection allowance details will be required.

Confirm all questions and enter all required information.

Select **'Save'**.



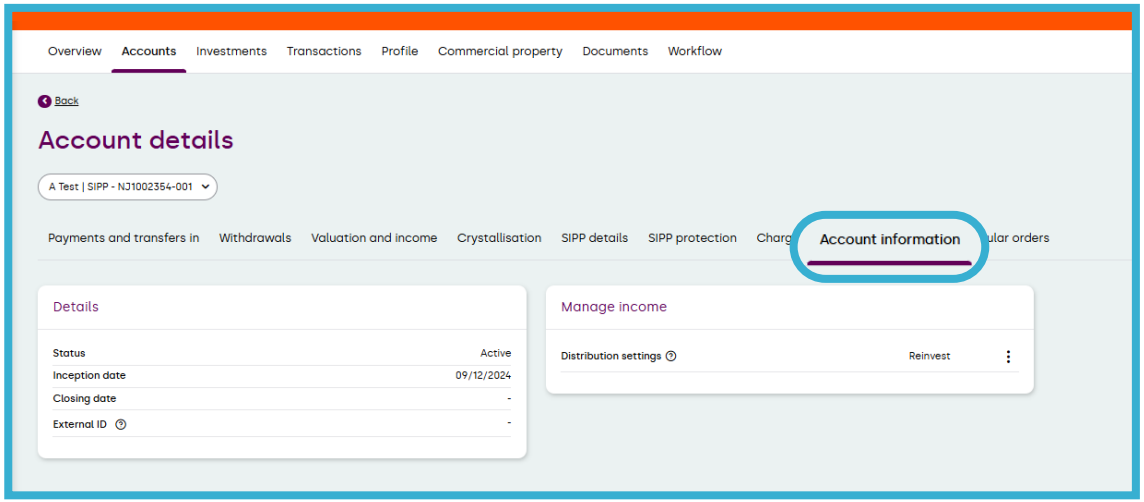
Account information

All account information will be displayed under details.

Key message

The external ID is your client's previous James Hay account number before the account was upgraded to the Nucleus Platform.

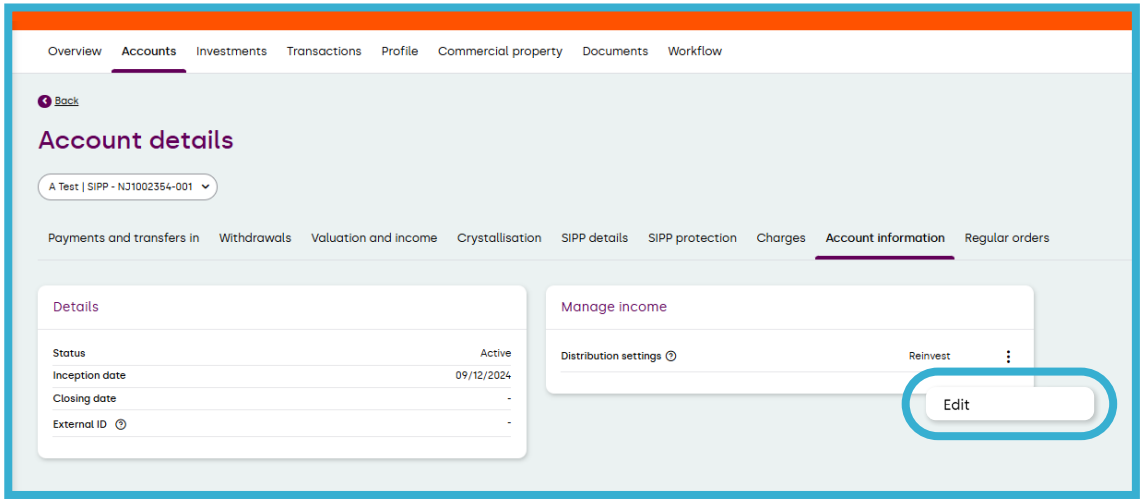
If your client's account has an investment manager, this information will be displayed here.



How to amend distribution options

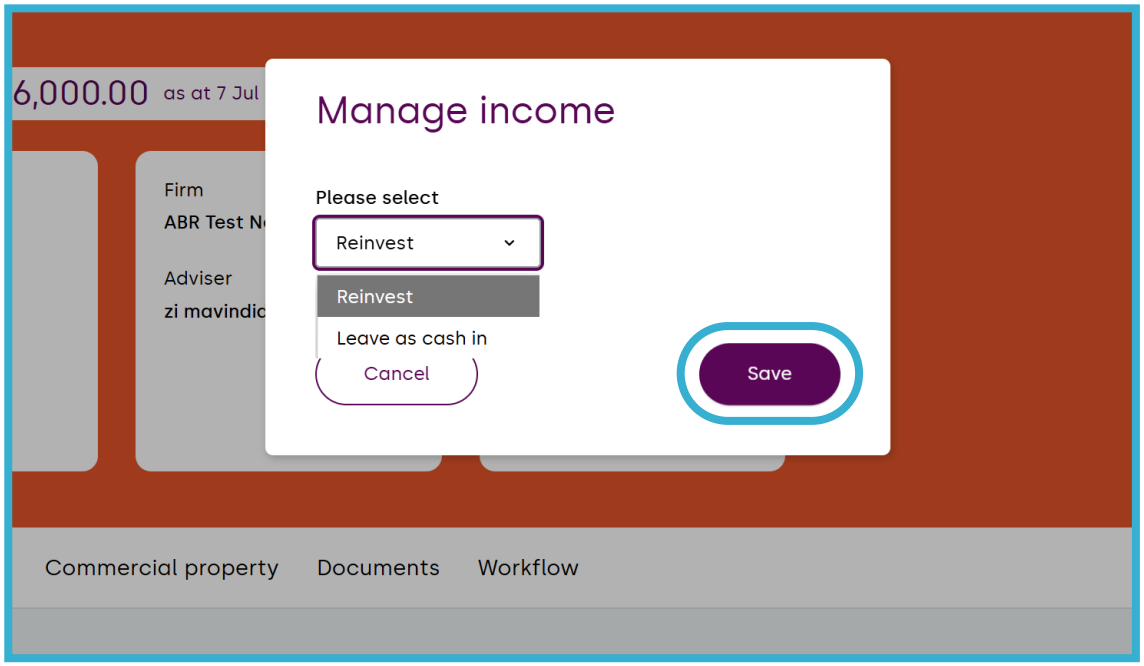
To amend your client's distributions preference, select the vertical ellipsis (three dots).

Select **'Edit'**.



Choose a distribution option from the drop-down list.

Select **'Save'**.



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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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