



## Adviser back office integration form

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

- **secure message** via your online account with us or
- email to [ABOintegrations@nucleusfinancial.com](mailto:ABOintegrations@nucleusfinancial.com).

If you need any help, please call our general enquiry number 03455 212 414.

Please use this form to let us know about the back office support systems you need access to.

### Section 1 - Firm details

This request applies to the principal firm only.

This request applies to the principal firm named below **and all appointed representatives**.

This request is only to be applied to the appointed representative firm named below

Name of firm

Financial Conduct Authority (FCA) number

Contact name

Telephone

Email

## Section 1a - Details of appointed representatives

Please provide the details of the **appointed representatives**.

Name of appointed representative (firm name), or

Name of appointed representative (firm name), or

Name of appointed representative (individual)

Name of appointed representative (individual)

Name of principal firm

Name of principal firm

FCA authorisation number

FCA authorisation number

Business address

Business address

Postcode

Postcode

Contact name

Contact name

Telephone

Telephone

Email

Email

If more than two representatives are appointed, please provide the additional details on a separate sheet

## Section 2 - System requirements

Please confirm which of the following back office solutions you need access to.

### Bulk valuations:

Adviser Cloud

Benchmark

Fastrak - Sprint

Intelliflo - intelliflo Office

Iress - Xplan

Moneyinfo

Morningstar Wealth

Time4Advice Ltd - Curo

### Electronic fee statements:

Fastrak - Sprint

Iress - Xplan

### Bulk transaction history:

Fastrak - Sprint

If there are any systems that you currently have access to that you would like us to remove, please list them below:

Section 2 of this form, should be read alongside Section 5 of the Adviser firm registration form, which was completed during the adviser onboarding process.

### Section 3 - Declaration

I request that the firm(s) named in Section 1 are provided with the access to the selections made in Section 2.

I confirm that I have the appropriate authority to make this request on behalf of all of those entities to which this application applies.

To be signed by a director, sole trader or partner as appropriate:

Applicant's signature

Full name

Date

Name of firm

Role

Contact number



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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