



Suite 202  
Warner House  
123 Castle Street  
Salisbury  
SP1 3TB

Customer Service Centre:  
[ask@nucleusfinancial.com](mailto:ask@nucleusfinancial.com)

[nucleusfinancial.com](http://nucleusfinancial.com)

## Welcome to the new Nucleus Platform

Dear

Client number:

We're delighted to welcome you to the Nucleus Platform! I'm pleased to confirm that we successfully upgraded your product(s) on **Monday 9 February 2026** and our updated Terms and Conditions now apply.

Our new platform is designed with you in mind, to help make your retirement more rewarding. It comes with more investment options than ever before as well as a wealth of useful features, more online processing and less paper.

The enclosed welcome booklet shares how to make the most of our improved service, including how you see your investments on our portal when you log in, or how to register if you currently don't have online access.

### Important – things you need to do

- New client and product reference numbers:** Your previous member number has been replaced by a new client number, which you can see at the top of this letter. You also have a new product reference number for each product you have with us, which are noted in the table below. Please use the appropriate product reference number for future payments you make to us.
- New bank details:** Our bank account details have also changed, please use these for any future payments to us. Your existing Direct Debits will automatically be redirected. **Important: If you have any existing standing orders (that don't relate to property investments) you'll need to replace them with a new Direct Debit.**

New upgraded product name	Product reference	Bank account details
Nucleus Modular iSIPP	XXXXXXXXXX	Account name: James Hay Pension Trustees Limited Sort code: 09-02-22 Account number: 11053565
Nucleus Modular ISA	XXXXXXXXXX	Account name: Nucleus Financial Services Limited Sort code: 09-02-22 Account number: 11095141
Nucleus Modular GIA	XXXXXXXXXX	
Nucleus Modular Offshore Bond	XXXXXXXXXX	
Nucleus Flexi SIPP	XXXXXXXXXX	Same as Nucleus Modular iSIPP above
Life company SIPP	XXXXXXXXXX	Same as Nucleus Modular iSIPP above
Self-managed SIPP – commercial property	XXXXXXXXXX	Account name: James Hay Pension Trustees Limited Sort code: 09-02-22 Account number: 11106412

- Tell others... payments reminder:** If you have an employer or other third parties that make contributions to your product(s) on your behalf, please let them know your new bank account and product reference details. **And if they make these payments by standing order, they'll need to replace them with a new Direct Debit, unless property investment related.**
- Choose your communication preferences:** Details about how to login to the new platform for the first time, and how to select to receive communications from us electronically, are in the enclosed booklet.

## Other changes



- Our new, simplified pricing is now in place.
- Annual charges and the platform charge will now be applied on the anniversary of the first product set up in your plan, except for annual drawdown fees which will be taken on the first crystallised arrangement anniversary date, and annual property fees which will be applied on the property purchase anniversary date.
- Payments to you will come from a new bank account.
- Records for up to the last five years are available.

Full details are in the Key Changes Summary that we previously sent you. You can view a copy online at [nucleusfinancial.com/upgrade-support/letters-and-tcs-customer](https://nucleusfinancial.com/upgrade-support/letters-and-tcs-customer).

If for any reason you're not happy with our new Terms and Conditions, you still have the option to transfer your investments to another provider. I recommend you discuss with a professional financial adviser what's right for you.

## Got a question?

Feel free to contact our Customer Service Centre team on the details below if you have a question.

Further information including the Terms and Conditions for your upgraded product, is available on our website. There you'll also find copies of the letters we've sent you previously, frequently asked questions about our new service, product information and more. Visit [nucleusfinancial.com/upgrade-support](https://nucleusfinancial.com/upgrade-support).

Thank you for continuing to invest through us. I look forward to you enjoying the benefits of our upgraded service.

Yours sincerely



Richard Rowney  
CEO

## We're here to help...

If you have any questions, we always recommend you speak with a financial adviser.

If you don't currently have an adviser, you can find one at [moneyhelper.org.uk](https://moneyhelper.org.uk).

Alternatively, you can:

- send us a [secure message](#) via your Nucleus Platform online account
- email us at [ask@nucleusfinancial.com](mailto:ask@nucleusfinancial.com)
- call us on 03455 212 414
- talk to us via web chat at [nucleusfinancial.com](https://nucleusfinancial.com)

We're open Monday to Friday between 8.30am and 5.30pm (excluding bank holidays).

We can't give financial advice, but we can provide information.

"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. 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](https://nucleusfinancial.com). 12/25