



# nucleus<sup>o</sup> platform

## GIA payment in 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 complete this form if you wish to make single or regular payments into your Nucleus GIA.

Your GIA bank details for making the payment can be found in your online account with us.

Any money received into your GIA will be applied to your product's cash account pending your investment instructions.

### Section 1 - Personal details

Title

Full name

Date of birth (DD/MM/YYYY)

Product number

Permanent residential address

Postcode

Telephone

Email

National Insurance number

Or

I have never had a National Insurance number

## Section 2 - Payment details

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

One-off payment amount (£)

I confirm I have made this payment by electronic bank transfer

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

I wish to make regular monthly payments of the following amount (£)

## Section 6 - 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)

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

### 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.

### Section 3 - Declaration

I declare that the payment(s) I have made or instructed comes from a personal/joint bank account in my name.


I declare that to the best of my knowledge and belief, the information given on this form is correct and complete.

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

Applicant's 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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**GIA**

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

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 Services limited will notify you 10 business days in advance of your account being debited or as otherwise agreed. If you request Nucleus Financial Services limited 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 Services limited 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 Services limited 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.