

For advisers

Our new
platform

nucleus^o platform

How to amend a
client's address,
contact details and
contact preferences

 2 minute read



How to amend a client's address, contact details and contact preferences

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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.

This guide contains instructions for amending your client's:

- Address
- Contact details
- Contact preferences

Key message

If you require changes to any other client details, please refer to the guides on our website. Alternatively, you can get in contact with us.

To change your client's address and contact details, you first need to find your client. You can refer to our guide to search for your client on our website.

Miss Jessica Example £370,389.95 as at 4 Jul 2025

Client number 108	Age 32	Date of birth 15 December 1992	Firm ABR Test Network	Address 89 Duddon Close, West End, SO18 3QB
Phone +44 07490176254 +44 07490176254	Email Jessica.example@gmail.com		Adviser JM Test Adviser	Residence UK Primary tax residency UK

Overview Accounts Investments Transactions Profile Commercial property Documents Workflow

Accounts owned		£370,389.95
J Example	Nucleus SIPP	£0.00
	NJ1002327-001	£0.00
J Example		£99,633.05

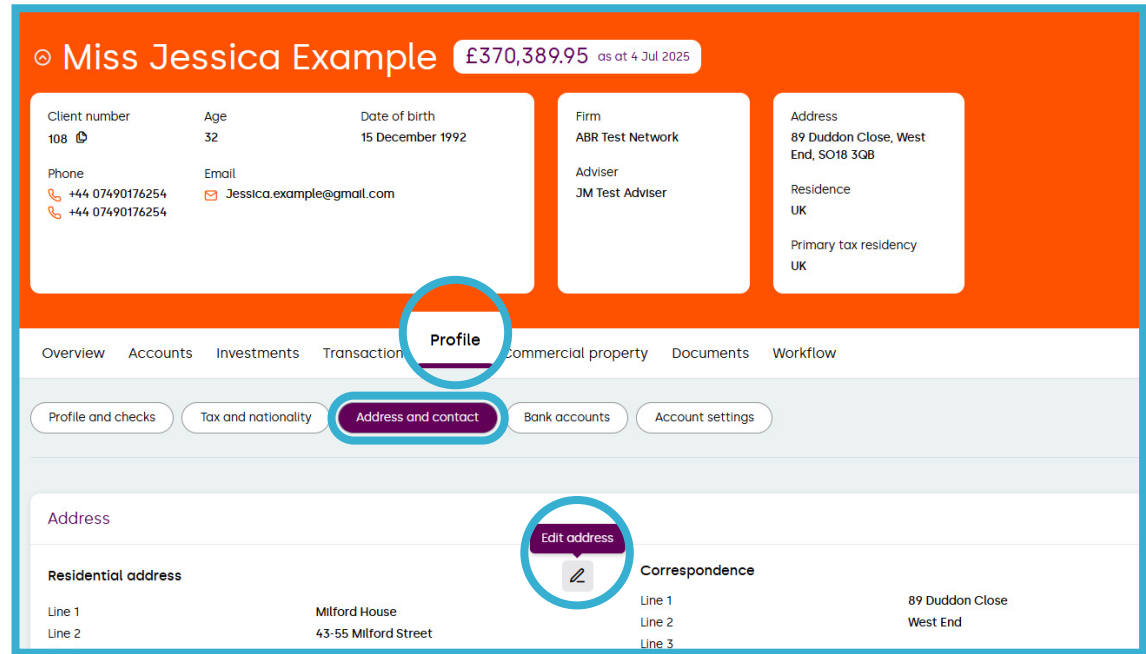
Documents		
Change of Address - New Address	11 Jun 25	Download
Change of Address - New Address	11 Jun 25	Download
Change of Address - Old Address	11 Jun 25	Download
Change of Address - New	11 Jun 25	Download

Change of address

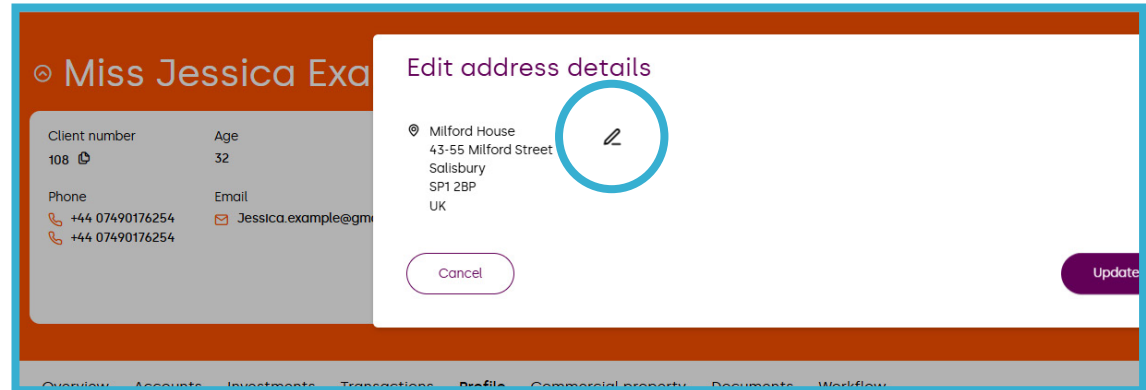
From the client's home page, select the **'Profile'** tab.

Select **'Address and contact'**.

Select the **'pencil'** icon to edit the address.



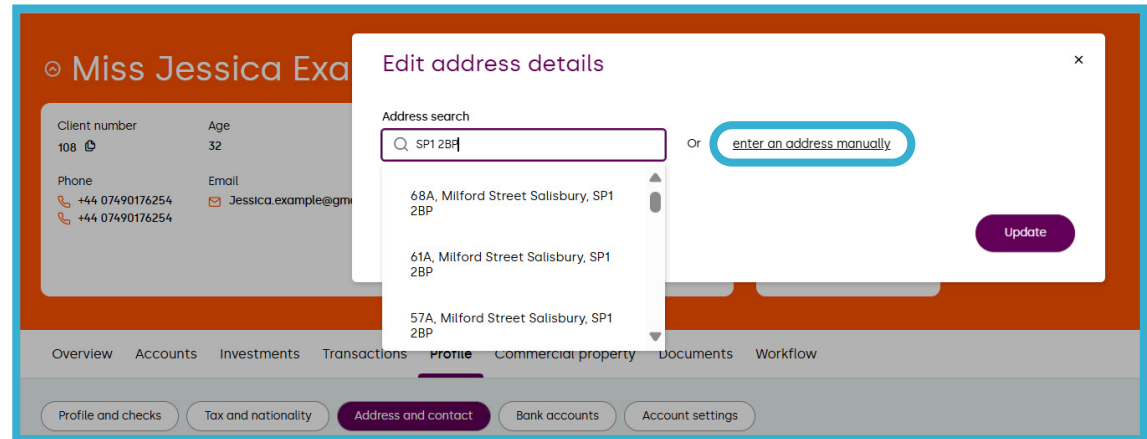
Select the **'pencil'** icon next to the address to edit the details.



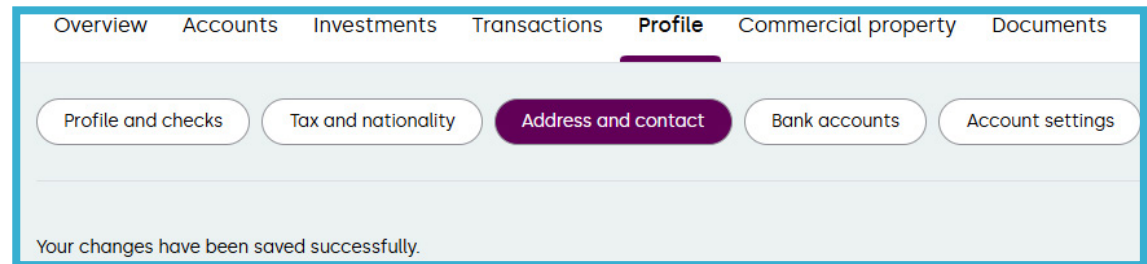
Enter your client's address or postcode into the search bar. If the address can't be found, select **'enter an address manually'**.

Review the address details for accuracy. Use the pencil icon to make any necessary changes.

Once you're happy with the accuracy of the address details, select **'Update'** to save your amendments.



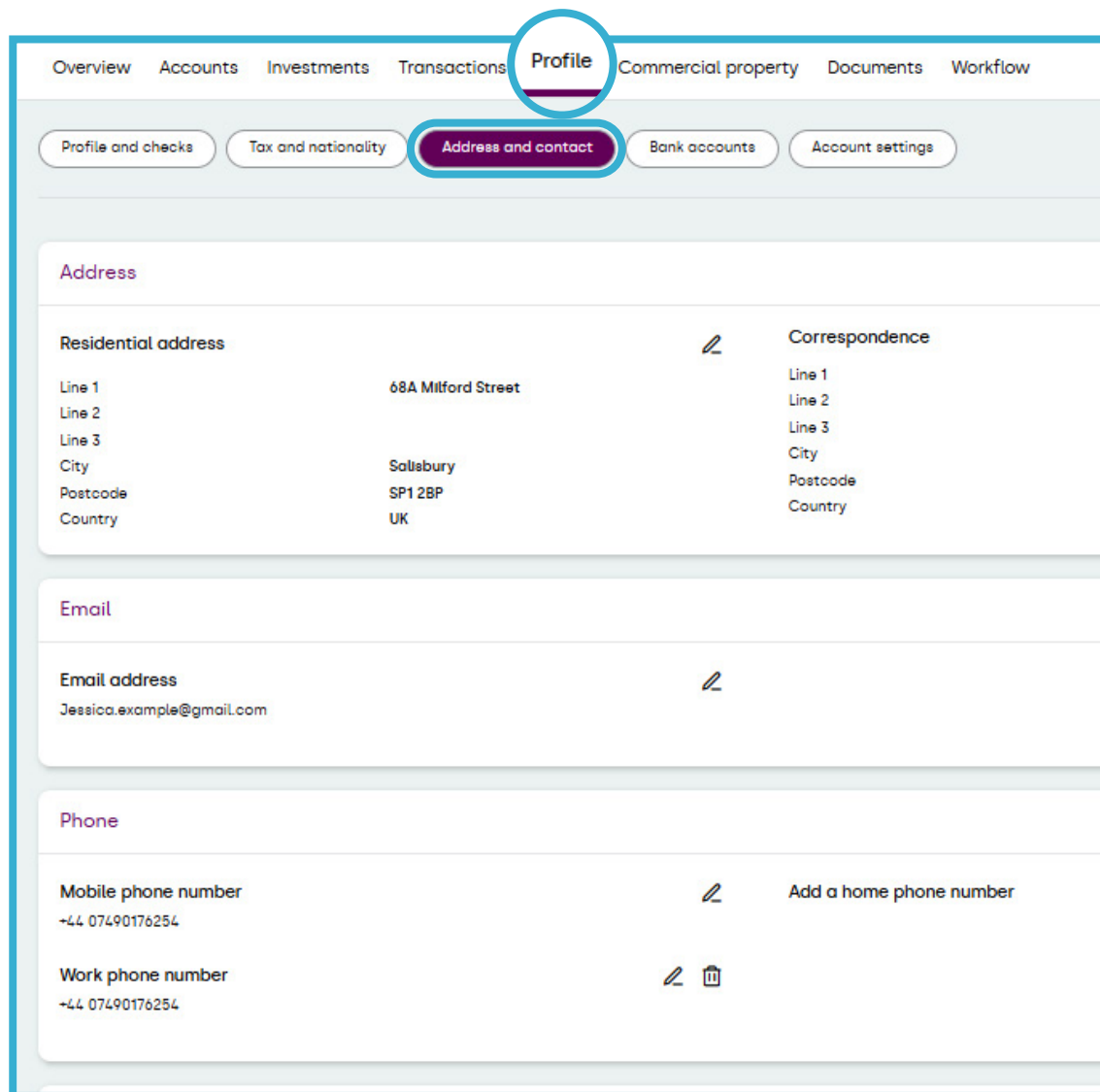
This notification bar confirms your client's address has been successfully updated.



Change of contact details

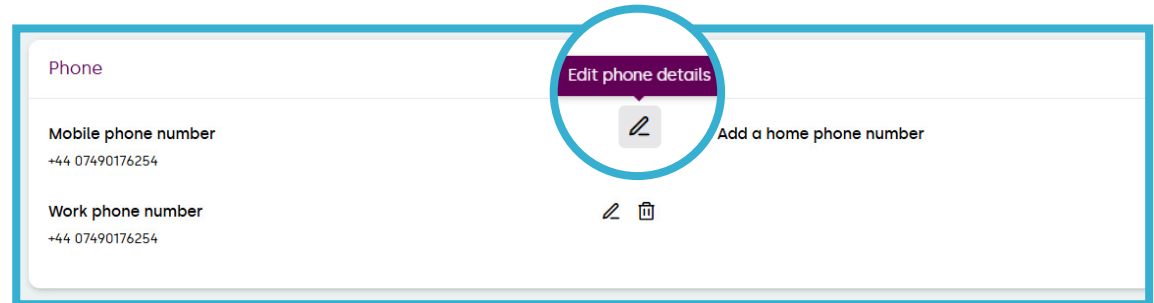
From the client's landing page, select the **'Profile'** tab.

Select **'Address and contact'**.



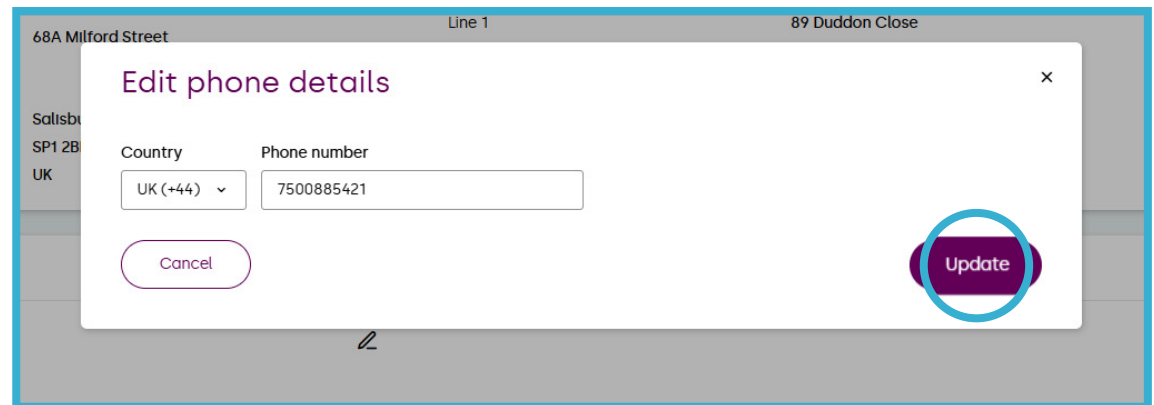
Edit phone number

Select the pencil icon next to the phone number that needs updating.

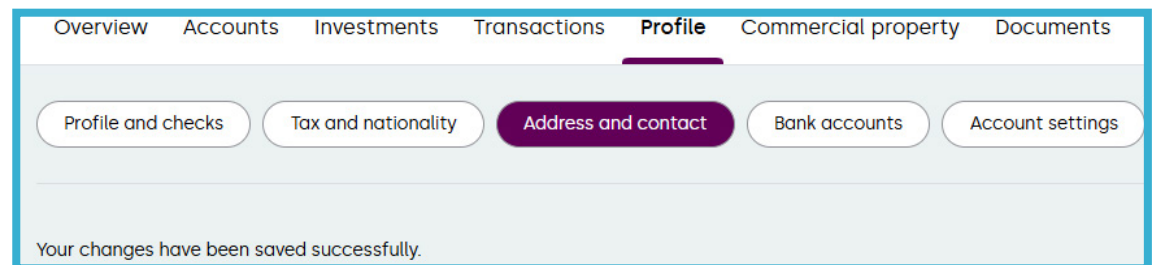


Select the country code. UK country code will be automatically selected.

Enter your client's phone number and then select **'Update'**.

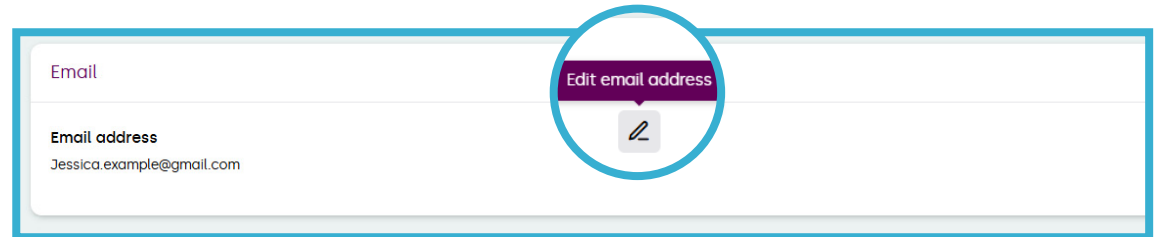


This notification bar confirms your client's phone number has been successfully updated.

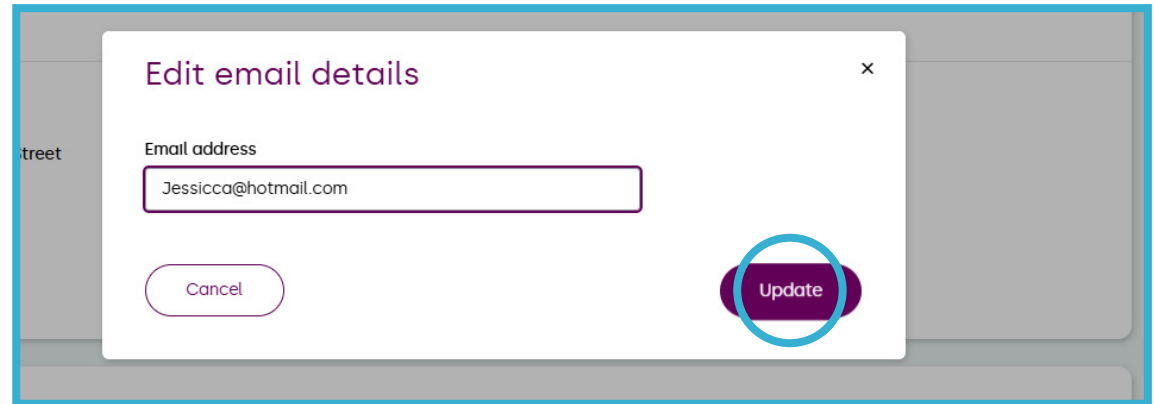


Edit email address

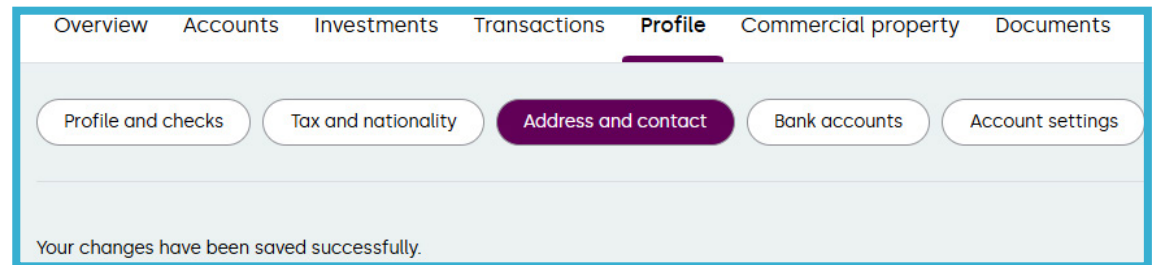
Select the **'pencil'** icon next to the email address that needs updating.



Enter your client's new email address and then select **'Update'**.



This notification bar confirms your client's email address has been successfully updated.

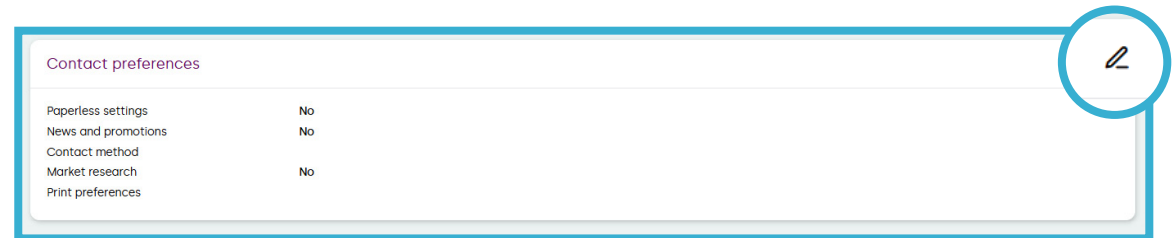
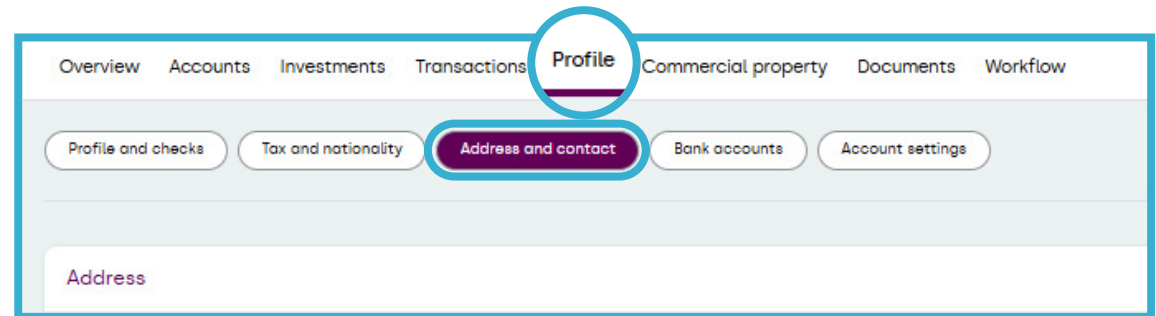


Contact Preferences

From the client landing page, select the **'Profile'** tab.

Select **'Address and contact'**.

Select the **'pencil'** icon next to contact preferences to edit the details.



Key message

The client will require existing customer portal access to set preferences.

Select the type of contact.

Confirm the contact method from the drop-down list.

Confirm print preferences.

Select **'Update'**.

Edit contact preferences

Paperless settings

News and promotions

Market research

Contact method

Email

Print preferences ⓘ

Audio Braille Large print Standard print


Cancel Update


This notification bar confirms your client's contact preferences have been successfully updated.


Overview Accounts Investments Transactions **Profile** Commercial property Documents

Profile and checks Tax and nationality **Address and contact** Bank accounts Account settings

Your changes have been saved successfully.

 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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