

For advisers

Our **new**  
platform



## First time log in and user registration

### Overview

To provide an understanding of how to access, register and log in to the platform as a new adviser firm user.

### Additional support:

Visit our [Help Hub](#) for more information and additional resources. If you need further support, please contact our Customer Service Centre.

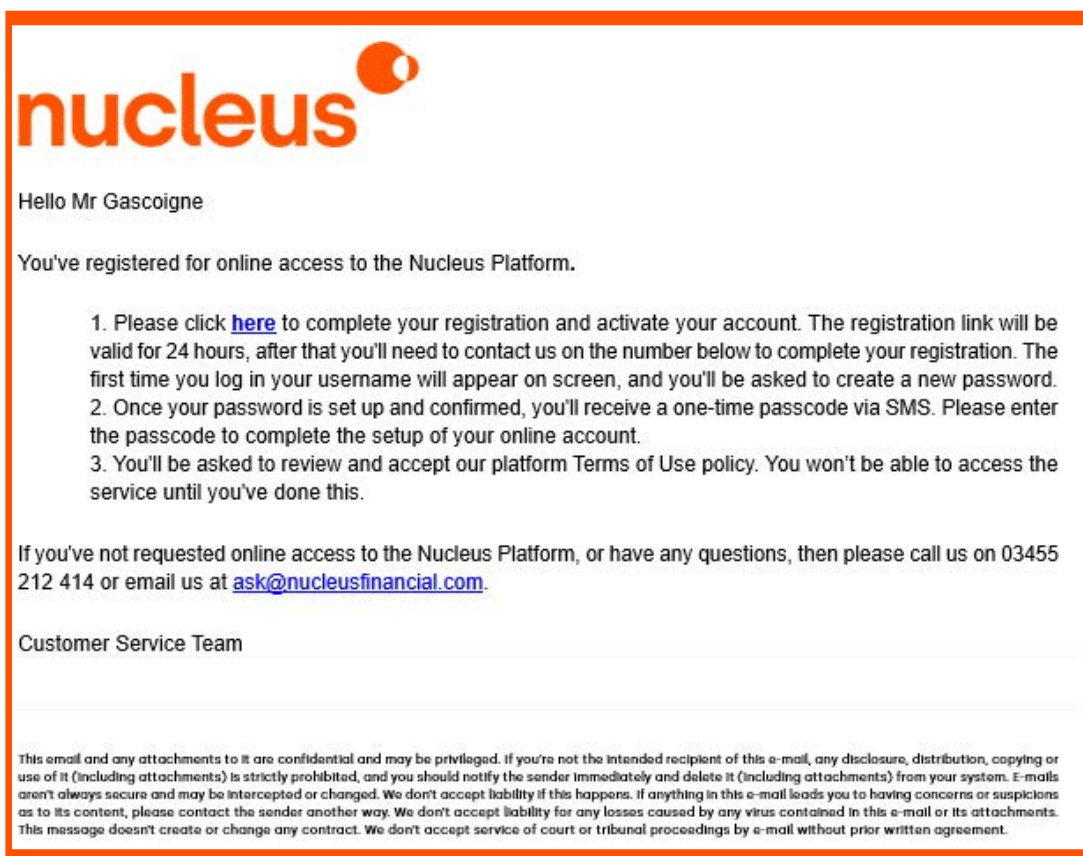
If you're an existing user upgrading from another platform, please refer to the process guides "How to register a fully upgraded user" or "How to register a dual running user" for guidance.

## Registration

As an adviser firm user, your access can be set up through your firm's "master user" or "user maintenance" role holder.

## Completing registration

Once you have been registered, you'll receive the below new user registration email. The email will be sent to your registered email address. Follow the instructions contained within the email. To log into your account, click on the activation link within the new user registration email.



You must log in within five days of receiving the new user registration email or the link in the email will expire. When the email link is expired, you will need to contact us to request a new link.

The link will redirect you to the initial log in page. You will be asked to create a new password for your account.

## Password rules

- Minimum eight characters, maximum 50
- Contains at least two numbers (0 - 9)
- One upper case letter required
- Remaining characters can be lower case, but not special characters
- Does not repeat the same character more than twice in succession
- Password history is set to record last 13 passwords

### Register

Your username is:  
**tgascoigne203**  
Please keep a note of this somewhere safe

Please enter your chosen password below and confirm it.

New password

[Show password](#)

Confirm new password

[Show password](#)

Your password needs to meet these requirements:

- Password length is between 8 and 50 characters
- Contains 2 or more digits
- Contains 1 or more upper case letters
- Contains 1 or more lower case letters
- Does not contain any special characters
- Does not repeat the same character more than twice in succession
- Is not one of the 13 most recently used passwords

[Save](#)

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#### Contact details

Your email is: [REDACTED]@nucleusfinancial.com  
Your mobile number is: [REDACTED]

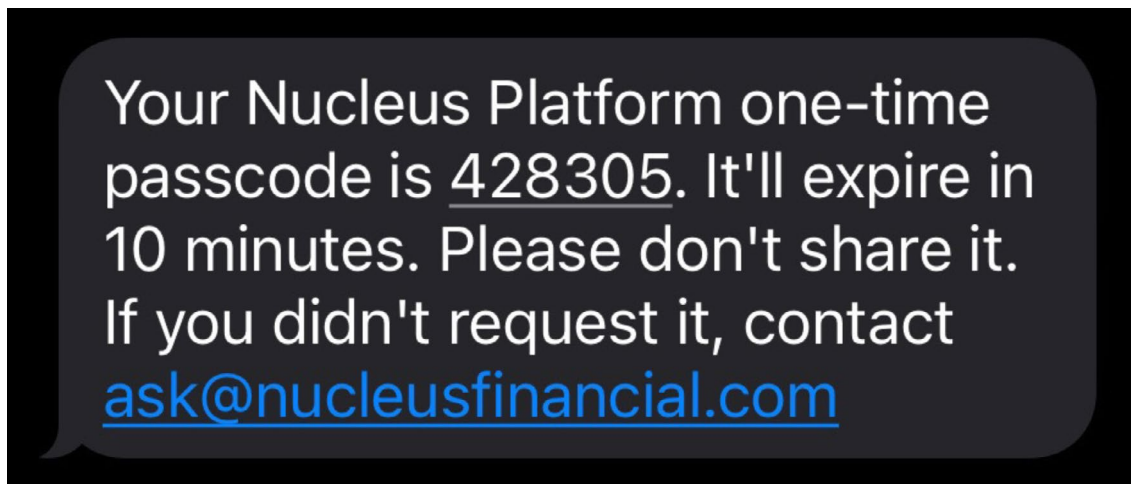


Your User ID is displayed at the top of this screen, please take note of this as you will need it when logging in. But don't worry if you forget it, a master user at your firm can look this up for you in the user app.

The contact details section at the bottom of the page confirms your registered email address and mobile phone number. Once you are happy with your password, select save to confirm.

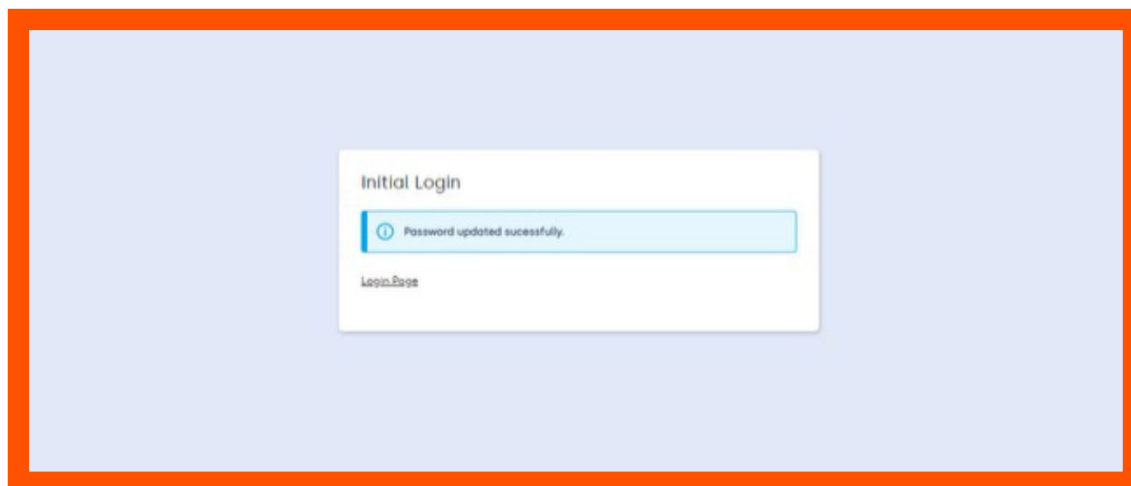
## One Time Passcode (OTP)

Once you have submitted your chosen password, you'll receive a text message to your registered mobile with your OTP code. After you're registered, subsequent OTPs will be issued to your email address.



Enter the code received in the space provided and you'll be directed to the success page, where you'll be provided with a link to the login page.

If the OTP is entered incorrectly 3 times you'll be locked out and you will have to speak to your master user or our service centre to unlock your account.



## Logging In

Once the registration process is complete, you will be able to log into the platform using your user ID and password. Once logged in, you'll need to enter the OTP password - this will be sent to your registered email. An OTP is required for the first time you log in each day.

The screenshot shows the Nucleus Platform login interface. At the top left is the 'nucleus platform' logo. A purple banner on the right says 'Our new platform'. Below this is a text block: 'Our brand-new Nucleus Platform is being trialled by a small number of ex-James Hay users. If you're one, this is the login you need. If you're looking for the original Nucleus Wrap platform or James Hay Online, please select the relevant platform login below.' The main login area has two input fields: 'User ID' with a 'Forgotten your User ID?' link and a question mark icon, and 'Password' with a 'Forgotten your password?' link and a 'Show password' link below it. There are two buttons: a purple 'Login' button and a white 'Register for online access' button. Below this are two separate login options. The first is for 'JAMES HAY PARTNERSHIP' with a 'Login' button. The second is for 'nucleus' with a 'Login' button and a 'Nucleus Go' button.

When you log in for the first time to the new Nucleus platform you'll be presented with the T&Cs to read and confirm. You'll need to agree to these to be able to use the platform.

☎ 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 Tynetalk service on 18001 03455 212 414.**

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