



Key changes to the Nucleus terms and conditions (0002.53) – effective from 28 February 2024.

Section	Change
General	<p>We've updated the Nucleus terms and conditions to reflect:</p> <ul style="list-style-type: none">i) the introduction of a 4th tier to the Nucleus Wrap platform charges;ii) the change in onshore bond provider from CASLP Ltd to Countrywide Assurance plc;iii) changes to our variation clause;iv) changes to our cancellation rights in respect of orphan customers; andv) changes to our intra-account transfer process. <p>The specific changes are set out in more detail below.</p>
Table 2	<p>Nucleus Platform Charge (annual) – Standard Charges</p> <p>We've updated the "level" column of the fees table in respect of the platform fee and introduced a new 4th tier for charging. The new tier means that the charge on the value of portfolios between £0.2m and £0.5m will be 30bps as opposed to 33bps previously applied at that level prior to 1 December 2023.</p>
3. General conditions	<p>3.1 Your right to cancel</p> <p>We've updated this section to align with changes made to our orphan customer policy. Orphan customers now have the option to waive their cancellation rights to allow Nucleus to invest money (as per their instruction) immediately.</p>
	<p>3.15 Variation</p> <p>We've updated this section to make it clear that we will notify clients in advance (30 days) of any material changes made to the terms and conditions but will only be required to inform clients of non-material changes within 30 days of the change being made.</p>
4. Operating your account	<p>4.2.4 Intra-account transfers</p> <p>We've amended this section to make it clear that we can accept account transfer instructions from an adviser on a client's behalf in certain circumstances.</p>

5. Account-specific conditions	5.5 Nucleus Onshore Bond account We've updated this section to reflect the fact that Countrywide Assurance plc is the new onshore bond provider following the transfer of business from CASLP Ltd.
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