

## Nucleus Isa declaration (existing clients only)

Nucleus client relations, PO BOX 26968, Glasgow G2 9DY.

Please complete and sign this form before sending it to us at the above address.

If anyone forgets to add a date to their signature, we'll treat the day we receive this form as the signing date.

This declaration should be completed when clients are opening a new Isa and already have other accounts on the platform.

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Client name

Account number

### Nucleus Isa account declaration

I apply to subscribe for a stocks and shares Isa for the tax year 2024/2025 and each subsequent year until further notice.

I declare that:

- all subscriptions made, and to be made, belong to me;
- I am 18 years of age or over;
- I have not subscribed/made payments, and will not subscribe/make payments more than the overall subscription/payment limit in total to any combination of Isas in the same tax year;
- I am resident in the United Kingdom for tax purposes or, if not so resident, either perform duties which, by virtue of Section 28 of Income Tax (Earnings & Pensions) Act 2003 (Crown employees serving overseas), are treated as being performed in the United Kingdom, or I am married to, or in a civil partnership with, a person who performs such duties. I will inform Nucleus Financial Services Limited if I cease to be so resident or to perform such duties or be married to, or in a civil partnership with, a person who performs such duties.

I authorise Nucleus Financial Services Limited

- to hold my cash subscription, Isa investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash in my Nucleus Isa account;
- to make on my behalf any claims to relief from tax in respect of Isa investments.

## Nucleus Isa declaration continued (existing clients only)

### Fees

I authorise Nucleus to pay my adviser the fees set out in the table below until otherwise instructed by me, in writing.

Fee type	Fee amount (£ or %)	Fee type	Fee amount (£ or %)	Fee type	Fee amount (£ or %)
Initial fee: Lump sum	£   %	Initial fee: Regular contribution	£   %	Annual adviser fee	£   %

### Signature

I hereby declare that the contents of this declaration are true and accurate and have been completed to the best of my knowledge information and belief.

I accept the terms and conditions associated with the Nucleus Isa account, previously provided.

I acknowledge that it is a serious offence to make false statements. False statements made in this declaration could lead to prosecution.

Signature

Date