

Press information

13 February 2014

Nucleus launches ISA toolkit for advisers

Nucleus, the adviser influenced wrap, has launched an ISA toolkit for advisers, aimed at ensuring their clients get the most out of the ISA season. The toolkit includes a series of six step 'how to' guides that will enable advisers to efficiently navigate their way around clients' ISA requirements before the end of the tax year.

The step-by-step guides offer guidance on opening, topping up and transferring clients' ISAs, as well as suitability paragraphs for advisers to use. There is a report available that provides a list of clients' ISA subscriptions for the current tax year as well as a list of all clients that have fully subscribed and details of those who still have some of their allowance available.

The toolkit also provides simple step-by-step guidance on how to open an ISA, how to add a client to the platform and advice on how to select the contribution type and the annual advice fee. Advisers can also find out which clients have not subscribed for the current tax year, allowing them to approach those not currently getting the benefits they could be.

Barry Neilson, Business Development Director, said:

"A record £84.2bn worth of ISA subscriptions went unused last year across the UK which means many people are potentially paying more in tax than they should.. The end of the 2013/14 tax year is fast approaching so time is of the essence for advisers. Through our new toolkit we hope to make it easier and simpler for advisers to maximise the tax efficiency of ISAs. We have designed all our information and processes to make it easier for advisers and included useful facts and figures, which can help them reach out to their ISA customers and speak in a language that means something to them."

The platform is accepting applications and top ups until 12 noon 4 April this year.

-Ends-

For further information please visit www.nucleusfinancial.com or contact:

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Notes to editors:

About Nucleus

Nucleus Financial Group is an online wrap based business platform.

Nucleus was founded in 2006 by a number of high quality IFAs who shared a commitment to create a market where advisors have the infrastructure and desire to place the client centre stage.

Since foundation Nucleus has established itself as a major force for change in the market. It is now a community of IFA businesses who through ownership and control of the business process seek to create a better customer experience.

The management team is led by David Ferguson chief executive, and offers extensive experience across all areas of the UK retail financial services market.

As at 31 January 2014 assets under administration on the platform were £6.4bn.

<http://www.nucleusfinancial.com/>