

Onshore Bond account supplementary application form

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

The Nucleus Onshore Bond account is provided by Sanlam Life & Pensions UK Limited and they require information in order to set up your account. Please complete this form and send to us at the address above. If you have any questions please contact your Nucleus client relations manager who will be delighted to help.

This supplementary form must be completed and submitted with the application pack. If this is not received this will cause a delay in the account opening process and any investment.

For applications by trustees, occupation and annual income band is only required to be completed if the trustee/trustees is/are funding the investment.

If any party signs but fails to date a signature, the date that Nucleus receives the supplementary application form will be deemed to be the date that the signing party signed this agreement.

Applicant(s) details

First applicant

Name

Investment amount

£

Employment Status (e.g. employed/self-employed/unemployed/retired)

Source of funds

Occupation (or previous profession where unemployed/retired)

Please provide details of the bank/building society account used to make your investment. If your investment is being provided by a bank or building society transfer/cheque, please provide details of the personal account/other investment from which the money was drawn.

Annual income band (please select)

Account name

£0-£14,999 £15,000-£29,999 £30,000-£59,999

£60,000-£99,999 £100,000-£149,999 £150,000+

Sort code

Second applicant

Name

Account/Roll number

Employment Status (e.g. employed/self-employed/unemployed/retired)

Bank/Building Society address

Occupation (or previous profession where unemployed/retired)

Annual income band (please select)

What is the source of wealth in relation to your investment?
This section only applies to the applicants/trustees funding the investment.

£0-£14,999 £15,000-£29,999 £30,000-£59,999

£60,000-£99,999 £100,000-£149,999 £150,000+

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Tick all boxes that may apply

Source	1st or sole applicant/ trustee	2nd applicant/ trustee	3rd trustee	4th trustee
Accumulated savings from employment				
Retirement fund				
Inheritance				
Sale of property/asset				
Company sale				
Sale/maturity of existing investments				
Gift				
Divorce Settlement				
Compensation Payment				
Lottery or betting win				

Please note that any other source of investment, not listed, must be approved before the application is submitted.

Trust details (to be completed where the applicants are the trustees of an existing trust)

We will require

- All of the details below completed.
- This application must be accompanied by the original Trust Deed and any Deed appointing or removing trustees. Alternatively, we can accept a photocopy of the original document(s) which have been certified in ink as a true copy of the original.
- A completed AML form for each trustee.

Name of trust

Date of trust creation

Settlor(s)

Nature and purpose of trust

Beneficial owner (entitled to assets)

Beneficial interests (entitled to income/interest arising from assets)

Correspondence address

Onshore Bond account supplementary application form continued

Trustee details

First trustee

Title, surname and forename(s) in full

Sex

Date of birth

NI number

Main residential address

Postcode

Telephone (home)

Telephone (mobile)

Email address

Country of Origin

Employment Status (e.g. employed/self-employed/unemployed/retired)

Occupation (or previous profession where unemployed/retired)

Annual income band (please select)

£0-£14,999 £15,000-£29,999 £30,000-£59,999

£60,000-£99,999 £100,000-£149,999 £150,000+

Second trustee

Title, surname and forename(s) in full

Sex

Date of birth

NI number

Main residential address

Postcode

Telephone (home)

Telephone (mobile)

Email address

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Country of origin

Telephone (mobile)

Employment status (e.g. employed/self-employed/unemployed/retired)

Email address

Occupation (or previous profession where unemployed/retired)

Country of origin

Annual income band (please select)

£0-£14,999 £15,000-£29,999 £30,000-£59,999
£60,000-£99,999 £100,000-£149,999 £150,000+

Employment status (e.g. employed/self-employed/unemployed/retired)

Occupation (or previous profession where unemployed/retired)

Third trustee

Title, surname and forename(s) in full

Sex

Annual income band (please select)

£0-£14,999 £15,000-£29,999 £30,000-£59,999
£60,000-£99,999 £100,000-£149,999 £150,000+

Fourth trustee

Date of birth

Title, surname and forename(s) in full

NI number

Sex

Main residential address

Date of birth

NI number

Postcode

Main residential address

Telephone (home)

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Postcode

This section should only be completed if regular withdrawals are required.

Telephone (home)

Fixed income amount

£

Telephone (mobile)

Or percentage of the premium

%

Email address

Payment frequency (please select)

Monthly Quarterly Half yearly Annually

Country of origin

Preferred start date

Employment status (e.g. employed/self-employed/unemployed/retired)

Power of Attorney

Where there is a Power of Attorney please complete this section.

Occupation (or previous profession where unemployed/retired)

We will require;

- 1 Completion of the details below.
- 2 The original Power of Attorney, Alternatively, we can accept a photocopy of the original document(s) which have been certified in ink as a true copy of the original.
- 3 A completed AML for each attorney.

Annual income band (please select)

£0-£14,999 £15,000-£29,999 £30,000-£59,999
£60,000-£99,999 £100,000-£149,999 £150,000+

Regular withdrawals

Please complete this section if you would like to receive regular withdrawals from your Nucleus Onshore Bond.

Payments will be made to the bank account aligned to your Nucleus wrap.

If total withdrawals, advice fees and discretionary fund manager fees exceed 5% per annum of total premiums paid (including additional investments) in any policy year, a chargeable event gain will arise. This may result in an income tax charge (unless the 5% allowance from previous years has not been used). Please refer to your adviser for further information.

Tax treatment depends on your individual circumstances and may be subject to change in future.

First attorney

Title Miss Mr Mrs Other (please state)

Full name

Male Female

Date of birth

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Full postal address

First life assured Last life assured

Please note that if the Bond is set up on a first death basis this will take effect upon the death of any one of the lives assured.

Postcode

Additional life/lives assured

Please insert title(s) and full name(s)

Second attorney

Title Miss Mr Mrs Other (please state)

Full name

Male Female

Date of birth

Full postal address

Postcode

Declaration

Please note that this document forms part of your application for the Nucleus Onshore Bond account together with the Nucleus Declaration and the terms and conditions of the Nucleus Wrap, all of which constitutes a legally binding contract between you and Nucleus Financial Services Limited.

- To the best of my/our* knowledge and belief all of the statements I/we* have given are true and complete and, together with the Nucleus terms and conditions and Policy schedule, will form the basis of the contract between me/us* Nucleus Financial Services Limited and Sanlam Life & Pensions UK Limited.
- I/We* have read and understood the product literature, the key features of the Nucleus Onshore Bond Account and accompanying illustration.
- I/We* have read the Privacy Policy referred to in the terms and conditions which explains how Nucleus and Sanlam may use my/our* personal data.

Lives assured details

A maximum of six lives assured may be selected.

Please note that where a new Nucleus Discounted Gift Trust is being established the Settlor(s) should not be a life assured.

Is the first applicant/trustee a life assured? Yes No

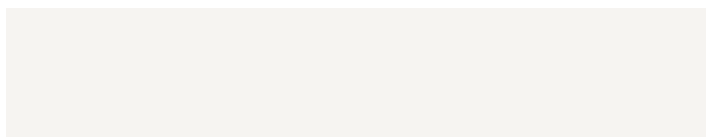
Is the second applicant/trustee a life assured? Yes No

Is the death benefit to be paid on the death of the first or last life assured to die?

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Signatures

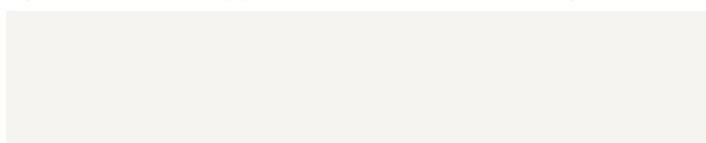
Signature of first/sole applicant/trustee (must be a 'wet' signature)



Print name

Date

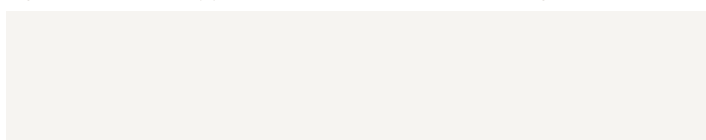
Signature of second/applicant/trustee (must be a 'wet' signature)



Print name

Date

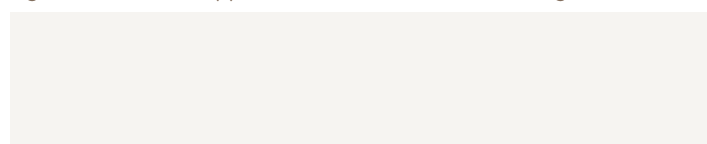
Signature of third/applicant/trustee (must be a 'wet' signature)



Print name

Date

Signature of fourth/applicant/trustee (must be a 'wet' signature)



Print name

Date