



Regular withdrawal instruction form

Please use black ink and write in CAPITAL LETTERS or tick as appropriate. Any corrections must be initialled. Please do not use correction fluid as this will invalidate your application.

Please note that a separate form is required for each plan

In case we need to contact you about your instructions.

Minimum payment £50 (except under the Forecast Income option).

The maximum amount requested cannot exceed 5% per year of the full value of your plan. Please see your Key Features document for details.

Forecast Income: A rate for each fund set and published by us each year based on the income returns we expect from the funds' investments.

About this form

If you have any questions about this form, you can call us on **0345 640 1000** between 8am and 6pm Monday to Friday.

Please send this completed form to:

PruFund Investment Plan Claims and Servicing, Prudential, Lancing BN15 8GB.

Plan details

Plan No.

On the Life/Lives of

Policy Owner(s)

Your telephone No.

Regular withdrawal options

Units to the value of each year

Or

Percentage of total amount paid into the plan to be withdrawn each year

 %

Or

Percentage of unit value to be withdrawn each year

 %

Or

The Forecast Income each year

 please tick

Frequency of payments

Withdrawals should be paid at the following frequency (please tick one choice)

- Every Month
 Every 3 Months
 Every 4 Months
 Every 6 Months
 Every 12 Months

Date units are first to be cashed in

The Forecast Income option payment date will automatically be based on the frequency selected (e.g. if quarterly payments are requested, the first payment will be 3 months after we receive this request) unless a date is specified.

If your investment is in both funds/accounts, regular withdrawals will be taken from both funds/accounts unless you specify otherwise. If you wish to take the regular withdrawals from only one fund/account please tick the fund/account in the box below. Please note that for the Forecast Income option you will receive the forecast income expected to be generated by that fund only.

Growth Fund/Account Growth & Income Fund/Account

Identification requirements

Our regulator, the Financial Conduct Authority (FCA) requires us to verify the identity of our customers before a withdrawal can be made. We may use approved credit reference agencies, tracing companies, financial crime prevention agencies, or publicly available information, to help us to check your identity, as well as to prevent fraud and money laundering; this may include checks on your current or previous addresses. Results of these may be recorded for future reference. These checks may also be carried out for a joint policy holder or person(s) that you provide personal information on. Should we ever lose contact with you, we may use these agencies to verify your address to help us get back in touch. Any transfer of your personal information will always be done securely.

For a copy of our latest Data Protection Notice, please visit www.pru.co.uk/mydata. This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a copy to be sent to you by writing to The Data Protection Officer, Customer Service Centre, Lancing BN15 8GB.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

If you provide account details that either the original investment was made from, or an account we have made payments into previously, we may not require evidence of your identity.

You may want to send us identity documents with the Regular withdrawal instruction to speed up the process.

We need one item from Group A and one item from Group B below for each owner.

If you are unable to provide any of these documents please telephone us to discuss alternatives.

Group A – Evidence of full name and either address or date of birth	Group B – Evidence of full name and current home address
<ul style="list-style-type: none"> A clear copy of a valid signed passport. OR <ul style="list-style-type: none"> A clear copy of a valid photo card driving licence (full or provisional)/ valid old style full UK driving licence. 	<ul style="list-style-type: none"> A clear copy of a current utility bill or evidence that shows current address (bank statement, solicitors letter, council tax bill, mortgage statement). To satisfy our regulators, we cannot accept online utility bills/ bank statements.

We do not accept mobile phone bills, credit card statements or a TV licence and cannot accept identity verification documents by email or fax.

If any of the copies are from outside the UK, they must be certified as true copies by an attorney, a notary or an embassy consulate authority.

Bank/Building Society payment details

This information must be provided before payment can be made.

If more than one payee, the address, including postcode, of each payee is required.

Payee Details

Full Name of Payee(s) (please provide name of company if applicable)

Full address of payee(s) including postcode

Name of bank or building society

Address

Sort code

 - -

Account Number

Roll Number (if applicable)

Account name

Signature(s) of owner(s)

The owner(s) of the plan should sign this form.

If a plan is held in trust all trustees must sign.

Owner 1

Date

D	D	M	M	Y	Y	Y	Y
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Owner 2

Date

D	D	M	M	Y	Y	Y	Y
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Owner 3

Date

D	D	M	M	Y	Y	Y	Y
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Owner 4

Date

D	D	M	M	Y	Y	Y	Y
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† If regular withdrawals together with any partial cash-ins during any policy year exceed 5% of the amount paid into a plan there may be a liability to higher rate income tax and/or any entitlement to the income tax personal allowance may be affected. Please contact your Financial Adviser for details.

This information is based on our understanding, of current taxation, legislation and HM Revenue & Customs practice, all of which are liable to change without notice. The impact of taxation (and any tax relief(s)) depends on individual circumstances.

Any income or withdrawal taken will reduce the value of your plan. If the income or withdrawals are more than any overall growth achieved the value of your PruFund Investment Plan will reduce below the level of original capital invested. The Guaranteed Minimum Death Benefit and, if you have selected it, the Capital Guaranteed Minimum Fund Value, will be reduced proportionately for any withdrawals.



www.pru.co.uk

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