

Regular withdrawal instruction form

How to fill out this form

Please use black ink and write in CAPITAL LETTERS or tick as appropriate.

If you make a mistake, cross it out and initial the change. Do not use correction fluid – it will invalidate this application.

About this form

Please read the Important Information section to help you to complete this form and ensure all legal owners of the Bond sign and date the request.

Please send this completed form to **Prudential International Assurance plc, Stirling FK9 4UE.**

Important Information

a) Tax warning: Please read before completing this form

If the total of regular withdrawals, one-off withdrawals taken across all policies in a Bond, any Ongoing and Ad hoc Adviser Charges, in any policy year, exceeds 5% of the amount invested, it will create a Chargeable Event for tax purposes and may produce a liability to income tax above the basic rate, and/or may affect entitlement to personal allowance and certain tax credits. This 5% allowance comes to an end once you have withdrawn 100% of the amount you invested. Please contact your financial adviser for details.

If you're not sure how your withdrawal will be taxed you should speak to your financial adviser before you submit this request.

- b) When regular withdrawals start or change, the amount requested during any 12 month period can't exceed 10% of the premium including additional investments.
- c) A regular withdrawal is only allowed if the bond value, before deducting any charges but after taking any negative balance into account, is more than £1000 after the withdrawal.
- d) Withdrawals are taken equally from all the policies in the Bond.
- e) Withdrawals are paid in £ Sterling.
- f) We may need documents to prove the entitlement of the person(s) requesting payments (e.g. Deed of Assignment).
- g) Where payments are made by Direct Credit or Telegraphic Transfer and we are unable to verify account ownership, we may need documentation to verify that the account is held in the name(s) of the policyholder(s). This can be provided by submitting a certified copy of a bank statement, or other suitable document, for the account to which funds are to be sent. **Payments can't be made until full Bank Account verification is confirmed.**

Bond Owner details

Bond Number (if known)

Bond Owner(s)

Bond Owner(s)

Withdrawal options

Payments will be made by Direct Credit to the Bank or Building Society account detailed below.

Minimum regular withdrawal payment is £100.

I/We want to receive each year

OR % p.a. of total investment to be withdrawn each year

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

Every Month Every two months Every three months
Every four months Every six months Every 12 months

Month and year you want to start taking a regular withdrawal (this must be at least 10 working days after sending this form to enable us to set up the regular withdrawal)

M	M	Y	Y	Y	Y
---	---	---	---	---	---

Payment will be made on the 15th day of each month and will usually reach your account within 5 working days.

We may need additional information (e.g. a certified copy of a bank statement) if payment is being made to an account where we can't verify the details of the account provided.

Please note that **all payments** will be made to the account specified unless otherwise told. We need to pay all the legal owners (except in the case of a Bond held in Trust), so any specified account must be in the names of all the legal owners.

For cases with multiple trustees, payments must be made to an account in the name of at least one of the trustees, as a legal owner, with the authority of the other trustees.

If you want to change this account, or request payment to a different account in the future, we may need additional identification/ verification documentation before any payments are made. This will also apply if any changes have been made to the account ownership.

Designated account for regular withdrawals

Do you want payments to be made to the account from which your original payment has been drawn? (please note this account must be a UK bank account)

Yes

OR

If you want payment(s) to be made to a different UK bank account in your name, please complete the details below.

Yes

Name of Bank/Building Society

Address

Sort Code

 - -

Account Number

Roll number (if applicable)

Account Holder(s) Name(s)

Signature(s) of owner(s)

Please complete this form in full to avoid any delays in processing this request. If the Bond is subject to trust, all trustees must sign.

1. I authorise Prudential International to proceed on the basis shown in this form.
2. I certify that
 - a) The Bond belongs to me.
 - b) No other person has an entitlement of any kind in respect of the Bond overriding or restricting my entitlement in any way.
 - c) I have authority to request this transaction.

This request must be signed by all the Bond Owners. If the Bond is subject to **trust** all the trustees must sign.

Capacity – please tick the appropriate box

Bond owner(s) Trustee(s) Other (please specify)
(eg power of attorney)

It is a criminal offence to knowingly provide false, misleading information and/or forged documents, signatures for the purpose/intention of committing fraud and this will result in prosecution.

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

pruadviser.co.uk

Prudential International is a marketing name of Prudential International Assurance plc. Prudential International Assurance plc, UK Branch is registered in the UK as a branch of Prudential International Assurance plc and its registered address is 3 Sheldon Square, Paddington, London W2 6PR. Registration No. BR017106. Prudential International Assurance plc is authorised and regulated by the Central Bank of Ireland, deemed authorised by the Prudential Regulation Authority and subject to regulation by the Financial Conduct Authority and limited regulation by the Prudential Regulation Authority. Details of the Temporary Permissions Regime, which allows EEA-based firms to operate in the UK for a limited period while seeking full authorisation, are available on the Financial Conduct Authority's website. Prudential International is part of the same corporate group as The Prudential Assurance Company Limited. Both The Prudential Assurance Company Limited and Prudential International are direct and indirect subsidiaries respectively of M&G plc, a company incorporated in the United Kingdom. The Prudential Assurance Company Limited is not affiliated in any manner with Prudential Financial, Inc, a company whose principal place of business is in the United States of America or Prudential plc, an international group incorporated in the United Kingdom.