



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.

About this form

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

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

Important Information

a) Important tax warning: Please read before completing this form

Withdrawals (including one-off withdrawals taken across all policies in a Bond and any Ongoing and Ad hoc Adviser Charges) in excess of 5% of the amount invested in any policy year may create a Chargeable Event for tax purposes and 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 This 5% allowance comes to an end once you have withdrawn 100% of the amount you invested.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 are in any doubt as to how your withdrawals will be taxed please consult your Financial Adviser before submitting this request.

- b) When regular withdrawals start or change, the amount requested during any 12 month period cannot 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 require such documents as necessary 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 require 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 cannot be made until full Bank Account verification is confirmed.**

Bond Owner details

Bond Number

Bond Owner(s)

Bond Owner(s)

Your (Bond Owner) telephone number

Your (Bond Owner) telephone number

(This is required in case we need to contact you regarding this request).

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 wish to receive £ each year

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

Designated account for regular withdrawals

Do you wish 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 would like payment(s) to be made to a different UK bank account in your name, please complete the details below.

Yes ☐

Name of Bank or Building Society

Address

<input type="text"/>
Postcode

Sort code

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>
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Account number

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Roll number (if applicable)

Account Holder(s) Name(s)

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

Please note that **all payments** will be made to the account specified unless otherwise advised. We are required 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 wish to change this account, or request payment to a different account in the future, we may require additional identification/ verification documentation prior to any payment being made. This will also apply if any changes have been made to the account ownership.

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
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Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Prudential International Assurance plc, UK Branch is registered in the UK as a branch of Prudential International Assurance plc which is authorised by the Central Bank of Ireland and subject to limited regulation by the Financial Conduct Authority and the Prudential Regulation Authority. Details about the extent of our regulation by the Financial Conduct Authority and the Prudential Regulation Authority are available from us on request. The registered address of Prudential International Assurance plc, UK Branch is 3 Sheldon Square, Paddington, London, W2 6PR. Registration No. BR017106. Telephone number 0207 004 4998. If the company should become unable to meet its liabilities, the Financial Services Compensation Scheme will protect eligible policyholders habitually resident in the UK when their contract starts. This protection does not extend to externally-linked investments – for further information please read the Key Features Document which is available on the Prudential website.

POPBW10008 03/2016