

## Regular withdrawal request form

## Notes to help you

This form lets you take regular withdrawals from Prudential International Investment Portfolio, Portfolio Account or Prudence Portfolio Bond.

This form is divided into sections. **Notes** can be found at the end of each section to help you fill in this form.

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

Please email a scanned copy of this form to prudentialinternational@prudential.co.uk

If you are sending by email please ensure your mail is encrypted, if not encrypted we recommend that you submit your request by post.

If you wish to submit a request by post – please send this completed form to: Prudential International Assurance, PO Box 13395, Chelmsford CM99 2GH

Section A – Personal details	
Bond Number	
Policyholders(s)	

## Section B – Information

Please read the following notes before completing this form.

- The minimum amount for each expected withdrawal payment, regardless of frequency, is normally £500 (or currency equivalent).
- b) Payments may be made by, direct credit or telegraphic transfer to a nominated bank account. Any method of transfer may attract a charge. For more information please read your Statement of Charges.
- c) In each policy year, you can currently withdraw up to 5% of an investment into the bond, without paying any immediate income tax. You can do this for 20 years (for additional investments this is from the policy year of investment) or until you've withdrawn an amount equal to the amount you originally invested. Please note that for Prudential International Investment Portfolio any Ad-hoc, Ongoing Adviser Charges or Ongoing Investment Adviser charges that are met from the bond will also count against this 5% tax-deferred allowance. If you're not sure as to

- how your withdrawal will be taxed please speak to your financial adviser before submitting this request.
- d) Any withdrawal is paid in the Cash-in Benefit Currency.
- e) If you have one or more Discretionary Asset Managers, please ensure you select where you would like your withdrawal to be funded from.
- f) If regular withdrawals are being taken from a bond, we will suspend these payments on change of ownership. We will need a written request from the new owner for them to resume or for a new arrangement to be set up. For Prudential International Investment Portfolio we will also suspend any adviser charges or investment adviser charges on change of ownership.
- g) Regular withdrawals (including Ongoing Adviser Charges) will not be allowed if it would take the bond value below the greater of, £7500 or 15% of bond investments in the previous 5 years.

Section C – Withdrawal details <sup>1</sup>				
I/We wish to receive every year (please spe	cify a monetary amount and currency)			
Payable: Every month Every three m  Every six months Every year	onths Every four months (Portfolio Account & Prudential International Investment Portfolio only)			
Regular withdrawal amounts can only be taken from a Deposit A If you have appointed one or more Discretionary Asset Manager payments to be funded from. If you don't give us this information	s, please detail below where you want your regular withdrawal			
Discretionary Asset Manager name Deposit Account/Disc	retionary Asset Manager currency Amount			
Deposit Account				
	Total			
Please note that the total amount in the table must equal the year				
Date of first withdrawal <sup>2</sup> : D D M M Y Y Y Y	(Please note this can't be within the first 30 days after your bond starts.)			
1. For payments by Direct Credit in £ Sterling to a UK based bank account only 3&4  Name of bank or building society				
Address				
	Postcode			
Account name				
Account Number	Sort Code			
Payment reference				
2.5. A0.5				
2. For payments by telegraphic transfer <sup>4&amp;5</sup> Name of bank or building society				
The street state of s				
Address				
Addiess				
	Postcode			
Netes				
<ul> <li>Notes</li> <li>Please provide up to date proof of identity and address verification for each policyholder. A certified copy of a utility bill or bank statement dated within the last 6 months will satisfy the address verification requirement. If the payee account is jointly owned, we will need full personal and address ID for all account owners.</li> <li>Regular income payments will usually reach your account within five working days of the date you have chosen.</li> <li>If you ask us to pay withdrawals by Direct Credit or</li> </ul>	<ul> <li>For all payments by Direct Credit or Telegraphic Transfer, Prudential International requires 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, for the account to which funds are to be sent.</li> <li>Please note that there is a charge for a one-off partial withdrawal or full cash-in benefit payment made by telegraphic transfer, for more information on this charge please see your Statement of Charges.</li> </ul>			

is received.

Telegraphic Transfer, we may deduct any charges that may

be incurred from the cash-in benefits before they are paid to

you. The cost may vary depending on the payment method. Please see your Contract Conditions for more details.

Payments can't be made until full Bank Account verification

account name			
(CCOUITC Harrie			
account Number		IBAN number	
ort/Swift code		BIC	
Section D – Autho	risation		
	npany to proceed on the basis shown in t	his form.	
. I/We certify that			
a) The bond belongs	to me/us.		
	as an entitlement of any kind in respect o	of the bond overriding or restricting m	ny/our entitlement in
any way.	ty to request this transaction.		
Capacity (please tick approof	opriate box)  Trustee(s)  Other (please specify)		
olicyfloider(s)	Other (please specify)	(eg power of attorney etc)	
lame		Signature	
Pate			
	D D M M Y Y Y Y		
lame		Signature	
) o to			
Pate	D D M M Y Y Y Y		
lame		Signature	
Pate	D D M M Y Y Y Y		
lame		Signature	
Pate	D D M M Y Y Y Y		
Address			
		Postcode	
s this a change of addres	ss?		Yes No
are you also changing yo	ur country of tax residency?		Yes No
	new country of tax residence		
	sidency Self-Certification form with this request. Available from		

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