

# Regular withdrawal request

## About this form

This form lets you request regular withdrawals from International Prudence Bond (life assured or capital redemption).

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

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 request.

## Personal details

Bond Number

Policy Owner(s)

## Information

Please read the following notes before completing this form.

- The minimum amount for each expected withdrawal payment, regardless of frequency, is normally £75, US \$112.50 or €112.50.
- Payments may be made by cheque or direct credit to a nominated bank account. Any method of transfer other than by cheque may attract a charge as noted in the Statement of Charges document.
- If you're unsure as to how your regular withdrawal will be taxed you should speak to your financial adviser BEFORE submitting this request. Tax may be payable where you make a regular withdrawal from your bond. Any tax liability may vary depending on your individual circumstances including, but not limited to, your tax residency status and the size of any regular withdrawal you make from your bond. Prudential International Assurance can't, under any circumstances, undertake tax calculations for bondholders or their advisers.

### UK Residents

Withdrawals of more than 5% every year of the total investment may create a chargeable event for UK resident policyholders.

**Please note (for policyholders resident in Cyprus and Malta only):** If the Bond is written in trust, evidence of the Trust's registration in the trust register of the Trust's country of residence must be provided.

**Please note:** If you have invested in a PruFund Protected Fund, regular withdrawals will erode the Guaranteed Minimum Fund.

Regular withdrawals from a PAC With-Profits Fund may be subject to a Market Value Reduction. Please see your Key Features Document for more details.

Any withdrawal is paid in the Cash-in Benefit Currency.

**Please note:** When you start or vary regular withdrawals from your bond, there is a maximum amount you can take in any 12-month period. This is based on a set percentage of either the amount you have paid in or the value of your bond. Please see your Statement of Charges document for more information.

Withdrawals will be taken across all funds in proportion and, if you have made more than one investment, in proportion to the value of units in each.

If you have previously cancelled a regular withdrawal request, or you subsequently cancel this request, we reserve the right not to allow regular withdrawals to re-start. This may apply where your bond is invested in any of the PAC With-Profits Funds and we need to exercise this right in order to protect the fund. This does not apply to bonds with numbers starting S6, S7, E6 or E7, which were issued or in process before 9 May 2011. Please see your Key Features Document for more information.

Tax rules can change, the impact of taxation (and any tax relief) depends on your circumstances.

## Withdrawal details<sup>1</sup>

Please arrange for the following withdrawals to be set up on the bond numbered on the first page:

- a)  every year (please specify amount and currency) OR
- b)  % of my/our total payment into the bond policies OR
- c)  % of the value of my/our bond policies at the date of withdrawal

Date of first withdrawal<sup>2</sup>

D	D	M	M	Y	Y	Y	Y
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(Please note that this cannot be within the first 30 days after your bond starts)

Frequency of withdrawals

Every month     Every 3 months     Every 6 months     Every year

### For payments by direct credit in £ Sterling to a UK based bank account only<sup>3, 4</sup>

If your account is a UK Bank account and you are resident outside of the UK please check with your Bank that they can accept your payment.

Name of bank or building society

Account name

Address

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/> Postcode

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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Sort code

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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IBAN

SWIFT-BIC

### For payments by Telegraphic Transfer<sup>3, 4</sup>

Name of bank or building society

Account name

Address

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/> Postcode

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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Sort code

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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IBAN

SWIFT-BIC

### Notes

- <sup>1</sup> 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.
- <sup>2</sup> Regular income payments will usually reach your account within five working days of the date you have chosen.
- <sup>3</sup> 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 details. Payments being made to locations outside of Europe in currencies other than Euro € and Sterling £ will be made by telegraphic transfer.
- <sup>4</sup> 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. We will need certified personal identification and address verification for any joint account holder in order to comply with all legal and regulatory obligations.

## Authorisation

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

Capacity (please tick appropriate box)

Policyholder(s)  Trustee(s)<sup>5</sup>  Other (please specify)   
(eg financial adviser, power of attorney etc)

Name

Date

D	D	M	M	Y	Y	Y	Y
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Signature

Name

Date

D	D	M	M	Y	Y	Y	Y
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Signature

Name

Date

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

Signature

Name

Date

D	D	M	M	Y	Y	Y	Y
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Signature

Address

<input type="text"/>	
<input type="text"/>	
<input type="text"/>	Postcode <input type="text"/>

Are you changing your address?

Yes  No

Are you changing your country of tax residency?

Yes  No

If **Yes**, please tell us your new country of tax residence and complete our Tax Residence Self-Certification Form (INVF11804)

## Trust Registration (for trustees of Cypriot and Maltese trusts only)

Has the trust been registered in the trust register in its country of residence, where applicable?

Yes  No

If yes, have you provided a certified copy of the trust's registration?

Yes  No

If the trust has not been registered in the trust register in its country of residence, please provide an explanation as to why the trust does not need to be registered.

What is the trust registration number, where applicable?

### Notes

<sup>5</sup> Please note this isn't available to policyholders in France.

[www.prudential-international.com](http://www.prudential-international.com)

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