

# 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 send this completed form to  
**Prudential International, Stirling FK9 4UE.**

## Section A – Personal details

Bond Number

Policyholders(s)

## Section B – Information

Please read the following notes before completing this form.

- a) 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 You can do this for 20 years (for additional investments this is from the policy year of investment) or until you've withdrawn an amount equal to the amount you originally invested.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 specify a monetary amount and currency)

Payable:  Every month  Every three months  Every four months (Portfolio Account & Prudential International Investment Portfolio only)  
 Every six months  Every year

### 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. If the payee account is jointly owned, we will need full personal and address ID for all account owners.



## Section C – Withdrawal details – continued

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.

Account name

Account Number

IBAN number

Sort/Swift code

BIC

## Section D – 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)  Other (please specify)   
(eg power of attorney etc)

Name

Signature

Date

Name

Signature

Date

Name

Signature

Date

Name

Signature

Date

Address

  

Is this a change of address?

Yes  No

Are you also changing your country of tax residency?

Yes  No

If yes, please advise your new country of tax residence and complete our Tax Residency Self-Certification form (INVF11804) and submit with this request.

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