

# Regular withdrawal request form

## Some information before you start

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.

## How to return this form

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 1 – Personal details

Bond Number

Policyholders(s)

## Section 2 – 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 You can do this for 20 years (for additional investments this is from the policy year of investment) or until you've withdrawn an amount equal to the amount you originally invested.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.
- h) Any withdrawals made from your bond may affect the level of ongoing adviser charges paid to your adviser.

### Section 3 – Withdrawal details<sup>1</sup>

Please read your **Contract Conditions** for further information on the withdrawal limits available on this product.

I/We wish to receive  every year (please specify a monetary amount and currency)

Payable every: ☐ 1 month ☐ 3 months ☐ 4 months (Portfolio Account & Prudential International Investment Portfolio only)  
☐ 6 months ☐ 12 months

Example: If you wanted to take £1,000 per annum to be paid quarterly, you would ask to receive £250 and tick the box for every three months.

Does this instruction replace an existing regular withdrawal instruction on the policy?

Yes

☐

No

☐

Regular withdrawal amounts can only be taken from a Deposit Account or assets managed by a Discretionary Asset Manager. If you have appointed one or more Discretionary Asset Managers, please detail below where you want your regular withdrawal payments to be funded from. If you don't give us this information we may not be able to pay your regular withdrawals.

Discretionary Asset Manager name	Deposit Account/Discretionary Asset Manager currency	Amount
	Deposit Account	
Total		

Please note that the total amount in the table must equal the yearly amount entered in the box in the first line of this section.

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

D	D	M	M	Y	Y	Y	Y
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(Please note this can't be within the first 30 days after your bond starts.)

If you've requested a payment to be made to an account other than the source account<sup>3</sup> or known account<sup>4</sup>, we will contact you directly for further verification.

#### 1. For payments by Direct Credit in £ Sterling to a UK based bank account only<sup>5&6</sup>

Name of bank or building society

Address

Postcode

Account name

Account Number

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Sort Code

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Payment reference

## Section 3 – Withdrawal details – continued

### 2. For payments by telegraphic transfer<sup>6&7</sup>

Name of bank or building society

Address

Postcode

#### Notes

- 1** Please provide up to date proof of identity and address verification for each policyholder. A 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.
- 2** Regular income payments will usually reach your account within five working days of the date you have chosen.
- 3** A source account is the verified account which your investment(s) was/were made from to Prudential International.
- 4** A known account is one which Prudential International has made a previous payment to within the last 12 months.
- 5** If you ask us to pay withdrawals by Direct Credit or 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.
- 6** 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 copy of a bank statement, for the account to which funds are to be sent.
- 7** 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.

**Payments can't be made until full Bank Account verification is received.**

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 4 – 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

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

Postcode

Is this a change of address?

Yes

☐

No

☐

Do you complete tax returns in any other countries outside of the UK, or are you a tax resident in an overseas country?

Yes

☐

No

☐

If yes, please complete the Tax Residency Self-Certification form (INVF11804). If you are only a UK taxpayer, you don't need to complete this form.