

# Request for Distributions or Regular Withdrawals

## How to fill out this form

Please use black ink and CAPITAL LETTERS or tick ☒ as necessary. Any corrections must be initialled by all parties signing this form. Please do not use correction fluid as this will invalidate the form.

For Policies under trust, use of this form will give rise to obligations under the Trust Registration Service (TRS). Further information on registration can be found at [gov.uk/guidance/register-a-trust-as-a-trustee](https://gov.uk/guidance/register-a-trust-as-a-trustee). You will need to send us the proof of registration document along with this form. We cannot action your request until we receive this document, or the exemption reason, so encourage you to provide this in a timely manner. If you previously provided us a copy we require an up to date version which must be dated within the last 30 days. If the action you are taking will mean closure of the TRS record then ensure you print or save a copy of the proof of declaration before closing the record.

\*Please tick.

## About this form

Please complete in all cases

Distribution Bond Number

I am/We are entitled (as Trustees\*) to the proceeds from the above numbered Distribution Bond and request payment to be made in terms of the regular withdrawal provisions detailed below.

\* Delete if Bond not written under Trust

Investor's Name

Second Investor's Name (if applicable)

Signature of Investor

Signature of Second Investor

Signed at

 (Place)

on

Signed at

 (Place)

on

Current address

  
 Postcode

Date of birth

Is this Bond Assigned?\*

Yes ☐ No ☐

If Yes please obtain the signature of Assignees (see part A).

Is this Bond written under Trust?\*

Yes ☐ No ☐

If Yes please obtain the signature of all Trustees who are not also Investors (see part B) and refer to the note at the left side of this page about TRS registration.

Depending on the type of trust and its provisions, the settlor may not be able to benefit from any withdrawals. Your financial adviser will be able to help you. Your adviser may charge for any advice given.

## How we use your personal information

For a copy of our latest Data Protection Notice, please visit [pru.co.uk/mydata](https://pru.co.uk/mydata).

This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a hard copy to be sent to you by writing to The Data Protection Officer, Customer Service Centre, Lancing BN15 8GB. Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

## About this form – continued

Please complete either 1 or 2

### 1. Details of Distribution Income required

I/We wish to receive distributions from the next quarterly distribution date (1 March, 1 June, 1 September and 1 December each year) payable.

Quarterly ☐

For monthly distributions there is a minimum initial investment of £15,000.

Monthly ☐

### 2. Details of Regular Withdrawal required

(a) Amount to be withdrawn per instalment

£

(b) Date of first payment

(c) Frequency of payment

Yearly ☐

Half Yearly ☐

Every 4 months  
(termly) ☐

Every 3 months  
(quarterly) ☐

Monthly ☐

The above Distribution or Regular Withdrawal selection will replace any existing selection.

### Payments are to be made to

Name and Address of Bank

Postcode

Sort code    –    –

Account Number

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Account Holder's name.

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A copy of the completed Distribution or Regular Withdrawal Request Form and the plan terms and conditions are available on request.

Currently, for individual policyholders, withdrawals of up to 5% per annum of your bond investment can be made without triggering an immediate tax charge. Withdrawals in excess of the 5% tax deferred allowance, which is available every year for the first 20 years of an investment into the Bond, may give rise to a Chargeable Event for tax purposes. Depending on your financial circumstances, this may produce a liability to income tax in excess of the basic rate. In addition it may affect entitlement to personal allowances and to certain tax credits. If you are in any doubt as to how your withdrawals will be taxed please contact your Financial Adviser for details. Your Adviser may charge for any advice given.

The above information is based on our understanding of current taxation, legislation and HM Revenue & Customs practice, all of which are liable to change without notice. The effect of taxation, (including any tax relief), is based on individual circumstances.

## Part A – Bond assigned

I consent to the withdrawal provisions detailed previously.

Signature of Assignee/Authorised Signatory  
if signing on behalf of a company

Name of Assignee/Authorised Signatory

Show company name here if signing on their behalf

Signed at

 (Place)

on

D	D	M	M	Y	Y	Y	Y
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Office stamp (if appropriate) below:

## Part B – Bond under trust

I/We am/are entitled as Trustee(s) to the proceeds of the Distribution Bond numbered request payment to be made in terms of the withdrawal provisions detailed overleaf.

Name of Trustee

Name of Trustee

Signature of Trustee

Signature of Trustee

Signed at

 (Place)

on

D	D	M	M	Y	Y	Y	Y
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Signed at

 (Place)

on

D	D	M	M	Y	Y	Y	Y
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Name of Trustee

Name of Trustee

Signature of Trustee

Signature of Trustee

Signed at

 (Place)

on

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

Signed at

 (Place)

on

D	D	M	M	Y	Y	Y	Y
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This form should be completed and sent to Prudential, Lancing BN15 8GB.

Prudential reserves the right to examine any relevant Deeds of Title before making a payment under the Bond.

If there are more than four Trustees who are not Investors please obtain their signatures in a similar format.

Please use CAPITAL LETTERS.

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