

Request for Regular Withdrawals or Distributions form

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

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-atrustee 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.

About this form

Please complete in all cases

Policy Number(s). You can use this form for multiple policies, up to 10, only where they currently have an identical fund split and the regular withdrawal instructions are the same. (For the Flexible Investment Plan, please see important note 1.)

Copies of the plan terms & conditions and completed application form are available on request.



I am/we are entitled (as Trustees*) to the proceeds from the above numbered policy(ies) and request payments to be made in terms of the regular withdrawal/distribution provisions detailed overleaf.

*Delete if policy(ies) not written under Trust.

How we use your personal information

For a copy of our latest Data Protection Notice, please visit **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 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.

ł	Investor's Name		Second Investor's N	Name (if applicable)	
	Signature of applicant		Signature of Second	d Investor	
	Signed at		Signed at		
		(Place)			(Place)
	on D D M M Y Y	ΥY	on	D D M M Y Y	ΥY
	Is this/Are these policy(ies) Yes	No	If Yes please obtain overleaf (Section A)	the signature of Assignee).	S
	Is this/Are these policy(ies) Yes vritten under Trust?	No	also investors overle	the signature of all Trustees af (Section B) and refer to tl s page regarding TRS regist	ne note

Depending on the type of trust and its provisions the Settlor(s) may not be able to benefit from any withdrawals. Your financial adviser will be able to help with this.

Please tick.

Please tick.

Section A – Policy(ies) Assigned

I, the assignee, consent to the regular withdrawal/distribution provisions as detailed overleaf.

Name of duly authorised person

Note: Prudential reserves the right to examine any relevant Deeds of Title before making payment under the policy(ies).

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

Signature of duly authorised person							Please put office stamp (if appropriate) below:
on behalf of							
		()	lame	of A	ssig	nee)	
Signed at							
					(P	lace)	
on	D D	M M	Y	Y	Y	Y	

Section B – Policy(ies) Under Trust

I am/we are entitled as Trustees to the proceeds from the above numbered policy(ies) and request payments to be made in terms of the regular withdrawal/distribution provisions detailed below/overleaf.

Name of Trustee		Name of Truste	е		
Signature of Trustee		Signature of Tru	ıstee		
Signed at		Signed at			
	(Place)				(Place)
on D D M	M Y Y Y Y	on	D D M	M Y Y	ΥY
Payments are to be made to: Name and Address of Bank					
			Postcode		
Sort Code – Account Number –					

Please use CAPITAL LETTERS.

	Please now complete either C or D					
	Section C – Complete this section if you wish to take regular withdrawals					
	- Choose one optior Section 1	n only from each secti	on			
	Please provide:	£	per instalment			
	or					
	please provide:	%	each year of the original inv	vestment		
	or					
	please provide:	%	each year of the current po	licy value		
Note that 20 working days notice should be given.	Section 2 The date of the firs	st payment is to be				
	Section 3					
	Please now indica	te the frequency of pa	ayment Every 4 months	Every 3 months		
Tick one.	Yearly	Half Yearly	(termly)	(quarterly)	Monthly	
Tick one.	(For the RPA Flexil will take place in p or b) by cance	elling an equal propo ble Investment Plan (s roportion to the exist elling units in the	tion of units in each Fund. old from February 1988 to F ing fund split).		lected withdrawal	

Section D – Complete this section if you wish to take distribution payments

Please select one option only

Note: quarterly distributions will be made in March, June, September and December except for the Investment Bond where distributions will be monthly and the Equity Bonus Bond where distributions are made in November each year. The selected option will apply from the next distribution date.

1.	I/We wish to receive distributions in full.					
2.	I/We wish to redirect the distributions into th	e fund(s) specified b	elow.			
3.	I/We wish to receive the distributions up to	%	of the original investment and wish to redirect any excess distributions			
			into the following fund(s):			

Fractions of 1% should not be used and selection totals MUST equal 100%.

Please refer to important note 5 for the maximum number of funds you can invest in.

Section E shows Prudential (previously M&G) funds available.

Fund name	% to be allocated	Fund name	% to be allocated

Section E – Available Prudential (previously M&G) funds:

For policies originally sold by M&G only:

Pru Cash (ex M&G) (1.00%)**	Pru M&G Global Sustain Paris Aligned (ex M&G) (1.00%)
Pru Income & Growth Bond (ex M&G) (1.00%)*	Japan Bond (ex M&G) (1.00%)
Pru M&G Corporate Bond Acc (ex M&G) (1.00%)*	Managed Bond (ex M&G) (1.00%)
Pru M&G Corporate Bond Dist (ex M&G) (1.00%)*	Pru M&G Managed Growth (ex M&G) (1.035%)**
Dividend Bond (ex M&G) (1.00%)*	Managed Income A Bond (ex M&G) (1.085%)**
Equity Bond (ex M&G) (1.00%)	Managed Income B Bond (ex M&G) (1.085%)**
Pru M&G European Sustain Paris Aligned (ex M&G) (1.00%)	Managed Income C Bond (ex M&G) (1.085%)**
Pru M&G UK Income Distribution Bond (ex M&G) (1.00%)	Prudential UK Equity (ex M&G) (1.00%)**
Pru M&G Gilt and Fixed Interest Income (ex M&G) (0.905%)	Pru Asia Pacific (ex M&G) (1.00%)
Pru M&G Global Themes (ex M&G) (1.00)*	M&G UK Sustain Paris Aligned Fund (ex M&G) (1.00%)
Pru International (ex M&G) (1.00%)	Prudential L&G Property (ex M&G) (1.25%)
High Yield Distribution (ex M&G) (1.00)*	Prudential US Equity Fund (ex M&G) (1.00%)

* Not available for all policies. Please contact Prudential if you want to check availability for your policy(ies).

** The M&G Investment Bond (also known as the Managed Income Bond and Managed Growth Bond) is only able to switch into these funds. Please note that the Managed Growth Fund is only available if your bond started after 01/07/94. Further, the "Pru M&G Managed Growth Fund", and the "Managed Income" (all Fund series), are only available to the M&G Investment Bond. If in doubt please contact Prudential.

IMPORTANT NOTES

- Only the Flexible Investment Plan Paxus series (sold from February 1994 to July 1999) uses a clustered/segmented structure. As a result, for this policy only, Regular Withdrawals will be made equally from each segmented policy of this contract. Please refer to your Policy Schedule/ Booklet if you are unsure of your plan series.
- Regular Withdrawals and/or Distributions are not available on all policies, and some options may be limited on others. Please contact Prudential if you want to check their availability for your policy(ies).
- 3. Please note that under current legislation, regular withdrawals in a policy year exceeding 5% each year of the total investment can lead to an income tax charge in excess of the basic rate in the year of assessment that the policy year ends. Entitlement to personal allowances and certain tax credits may also be affected. Any tax liability may vary depending on whether withdrawals are made from one policy, or from across a number of policies. You may wish to consult your financial adviser when considering which method you should use before taking the withdrawal. Your adviser may charge for any advice given.

This 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 impact of taxation (and any tax relief(s)) depends on individual circumstances.

- 4. The minimum amount of withdrawal is £50 per instalment.
- Policies can normally invest in a maximum of 20 funds at any one time. However if your plan(s) has/have both Capital and Accumulation units, the maximum is normally 10 funds. Please contact Prudential if you want to check availability for your policy(ies).
- 6. The figures in brackets overleaf are the current Fund Management Charges for each fund. In addition to our charges, there may be further costs incurred, which can vary over time. Where these are applicable, they are paid for by the relevant fund and will impact on its overall performance. For more information on these Further Costs, please look at the current Fund Guide for this product.

This form should be completed and sent to Prudential, Lancing BN15 8GB

pru.co.uk

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