Pru
part of M&G plc

Withdrawal request form

Please use black ink and write in CAPITAL LETTERS or tick ✓ as appropriate. Any corrections must be initialled by all parties signing this form. Please do not use correction fluid as this will invalidate your 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** 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 ensure this form is fully completed and signed by all relevant parties before returning it to us. If you need to contact us you can do so on **0345 640 3000**.

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

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.

Part 1 – 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.

Bond Number

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

Investor's Name

Signature of Investor

Signed at

Place on D D M M Y Y Y Y

Second Investor's Name

Signature of Second Investor

Signed at

Place on D D M M Y Y Y Y

Is this/Are these policy(ies) Assigned? Yes ☐ No ☐ If Yes please obtain the signature of Assignees (see Part 2 overleaf).

Is this/Are these policy(ies) written under Trust? Yes ☐ No ☐ If Yes please obtain the signature of all Trustees who are not also Investors (see Part 3 overleaf).

Depending on the type of trust and its provisions, the Settlor(s) of the trust may not be able to benefit from any withdrawals. Please speak to your financial adviser if you need any help. Your adviser may charge for any advice given.

Part 2 – Policy(ies) assigned

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

Signature of duly authorised person

on Behalf of

(Name of Assignee)

Signed at

(Place)

on D D M M Y Y Y Y

Office stamp (if appropriate) below:

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

Part 3 – Policy(ies) under trust

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

I am/we are entitled as Trustees to the proceeds from the policy(ies) numbered on page 1 and request payments to be made in terms of the instructions detailed in Part 4 & Part 5.

Name of Trustee

Signature of Trustee

Signed at Place on D D M M Y Y Y Y

Name of Trustee

Signature of Trustee

Signed at Place on D D M M Y Y Y Y

Please note that we cannot make payment to a third party.

Important Note: Full surrender of a policy and partial surrender of units in several policies will have different tax consequences. If you require any further information or advice, please contact your financial adviser. Your adviser may charge for any advice given.

This information is based on our understanding of current UK taxation, legislation and HM Revenue & Customs practice, all of which are liable to change without notice. The impact of taxation (and any reliefs) depends on individual circumstances.

Part 4 – Payment instructions

Please provide your payment instructions below. Payment will be made directly to the account details provided unless you tell us that a cheque is required.

Account name/payee

Sort code – –

Account number

Roll number *(if applicable)*

Is a cheque required? Yes No

If yes, cheque is to be made in favour of:

Name

and sent to:

Name

Address

Postcode

Part 5 – Withdrawal instructions

Important note:

Partial Withdrawals are not available on all policies, and may be limited on others. Please contact Prudential if you want to check the availability of this option for your policy(ies).

Tick one box only

1. Please provide £ by cancelling an equal proportion of units in each Fund.
2. Please provide cash by cancelling % of the total current fund value by cancelling an equal proportion of units in each fund.

For the following please specify which fund and percentage or cash value to be withdrawn from that fund:

3. Please provide £ by cancelling the appropriate number of units in the fund specified below.
4. Please provide cash by cancelling % of the total current fund value from the fund specified below.

Fund Name:

The following option is available only for FIB Series 3 (New) and FIB Series 4 and some Personal Security Plans.

5. Please provide cash by cancelling % of the original investment from across all funds evenly.
6. The following option is available only for Flexible Investment Plan (publication number M9P31).
   Please provide cash by cancelling clusters. (please insert number of clusters)
7. Please provide cash by cancelling all units held.

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

pru.co.uk

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