



Regular withdrawal request form

Notes to help you

This form enables you to request regular withdrawals from Prudential International Investment Portfolio, Portfolio Account or Prudence Portfolio Bond.

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

This form is divided into sections. **Notes** are provided at the end of each section to help you to complete the section.

Please send the completed form to **Prudential International, Stirling FK9 4UE**.

Section A – Personal details

Bond number(s)

Policyholder/Policyholders

Section B – Information

Please read the following notes before completion of 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 cheque, direct credit or telegraphic transfer to a nominated bank account. Any method of transfer other than by cheque may attract a charge. Please refer to the Statement of Charges for more information.
- c) Withdrawals of more than 5% every year of the total investment may create a chargeable event for UK resident individuals. 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 count towards the 5% tax-deferred allowance. If you are in any doubt as to how your withdrawal will be taxed please consult 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 require 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 permitted 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 details¹

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

- ¹ We may need to request additional information such as personal identification and address verification to comply with our legal and regulatory obligations. If the account is jointly owned, we will require full personal and address ID for all account owners.

Section C – Withdrawal details – continued

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 do not 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 withdrawal²: (Please note this cannot be within the first 30 days after your bond starts.)

1. For payments by Direct Credit in £ Sterling to a UK based bank account only^{3&4}

Name of bank or building society

Address

Postcode

Account name

Account number

Sort code

 - -

Payment reference

2. For payments by cheque (only where Direct Credit facility is not available and the payment does not exceed £5,000, US \$5,000 or Euro €5,000)

Name of payee(s)

Address payment to be sent to

Postcode

3. For payments by telegraphic transfer^{4&5}

Name of bank or building society

Address

Postcode

Notes

² Regular income payments will usually reach your account within five working days of the date you have chosen.

³ If you ask us to pay withdrawals by any method except cheque, 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 details.

⁴ 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 certified copy of a bank statement, or

other suitable document, for the account to which funds are to be sent. We will require certified personal identification and address verification for any joint account holder in order to comply with all legal and regulatory obligations. Payments cannot be made until full Bank Account verification is received.

⁵ Please note that there is a charge for a one-off partial withdrawal or full cash-in benefit payment made by telegraphic transfer, which is currently £17.

Payments cannot be made until full Bank Account verification is received.

Section C – Withdrawal details – continued

Account name

Account number

IBAN number

Sort/Swift code

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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 Financial Adviser, power of attorney etc)

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Address for correspondence

Postcode

Is this a change of address?

Yes ☐ No ☐

If Yes, please provide up to date address verification for **each** policyholder, such as a utility bill or bank statement dated within the last six months.

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.



The registered office of Prudential International is in Ireland at Montague House, Adelaide Road, Dublin 2. Prudential International is a marketing name of Prudential International Assurance plc. Registration No. 209956. Telephone number + 353 1 476 5000. If the Company should become unable to meet its liabilities, the Financial Services Compensation Scheme will protect eligible policyholders habitually resident in the UK when their contract starts, with effect from 1 December 2001. This protection does not extend to externally-linked investments. Prudential International Assurance plc is authorised by the Central Bank of Ireland and is subject to limited regulation by the Financial Conduct Authority for UK business. Details on the extent of our regulation by the Financial Conduct Authority are available from us on request.