



Regular withdrawal request form

About this form

This form can be used with the International Portfolio Bond to:

- Request a regular withdrawal
- Amend a regular withdrawal (please complete the relevant section(s) only)
- Stop a regular withdrawal (insert £0 in Section C)

If you have any questions when completing this form, please speak to a financial adviser before submitting.

If you need more boxes for any sections of this form, please photocopy the pages you need, complete them and send them in with this form.

Notes to help you

This form is divided into sections. **Notes** can be found at the end of each section to help you fill in this form.

Please speak with your financial adviser before completing this form. If you don't have a financial adviser and would like to know more about financial advice you can find out more information on our website: www.pru.co.uk/financial-advice/

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 this form.

If you're posting this form to us, please send it to, **Prudential International, PO Box 5177, Worthing BN11 9HJ**

Section A – Personal details

This section must always be completed.

Bond number

Policyholder(s)

Section B – Information

Please read the following notes before completing this form.

- a) The minimum amount which can be requested for each withdrawal payment, regardless of frequency, is £50.
- b) Payments may be made by direct credit to a nominated bank account.
- c) Withdrawals of more than 5% every year of the total investment may create a chargeable event for UK residents. Please note that any one-off withdrawals taken across all policies in a bond and any ad-hoc or ongoing adviser charges you ask us to deduct from the bond also count towards the 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 will be paid in UK Sterling.
- e) If regular withdrawals are being taken from a bond, we'll suspend these payments on change of ownership. We'll need a written request from the new owner for them to resume or for a new arrangement to be set up. For International Portfolio Bond we'll also suspend any adviser charges on change of ownership.
- f) The guaranteed maturity value available on the International Portfolio Bond – Capital Redemption will be reduced by any withdrawals or any adviser charges you have asked us to pay on your behalf.

Prudential International can't, under any circumstances, undertake tax calculations for policyholders or their advisers.

Section C – Withdrawal payment details¹

I/We wish to receive £ every

Month

three months

six months

year

Day you wish Regular Withdrawals to start² (this must be a date between the 1st and 28th)

Section D – Withdrawal disinvestment details

Please specify the funds which will be used to fund your Regular Withdrawals:³

A) Proportionally across all funds

OR

B) From specific funds

If B then:

In what ratios do you want to sell funds for your Regular Withdrawal? (please complete the table below using 2 decimal points)

Fund name	ISIN	Percentage (%)

Please note that the total amount in the table must equal 100%. Funds selected here must be funds you are invested in at the time of this instruction.

Section E – Where the withdrawal will be paid to

Payments must be made by direct credit in £Sterling to a UK based bank account.⁴

Name of bank or building society

Address

Account name

Account number

Sort code

 - -

Roll Number (where applicable for Building Society Accounts)

Payment reference

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 need full personal and address ID for all account owners.
- ² Regular withdrawal payments will usually reach your account within five working days of the date you have chosen.
- ³ Regular Withdrawals are paid from your cash account. Where there is insufficient cash, we'll sell funds according to your instruction.
- ⁴ For all payments by direct credit, 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 for the account to which funds are to be sent. Payments can't be made until full bank account verification is received.

Section F – Authorisation

This section must always be completed.

1. I/We request the Company to proceed on the basis shown in this form and attached photocopied pages.
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, or if the bond is assigned, the assignees have provided approval by signing on page four.
 - c) I/We have authority to request this transaction.

Capacity (please tick appropriate box)

Policyholder(s) Trustee(s) Other (please specify)

(e.g. 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
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Signature

Name

Date

D	D	M	M	Y	Y	Y	Y
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Signature

Address for correspondence

<input type="text"/>
<input type="text"/>
Postcode

Is this a change of correspondence address?

Yes

No

If this is a change of correspondence address, please tick this box and please provide up to date address verification for **each** policyholder, and send us a certified copy of 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.

