

Withdrawal request form

How to fill out this 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.

Withdrawals from a PruFund Protected fund will reduce the Guaranteed Minimum Fund. Withdrawals from any of the PruFund Funds may be delayed for up to 28 days. See policy rules for more details.

- Fractions of 1% or £1 should not be used.
- The minimum partial withdrawal is £1,000. You will be notified if any other restrictions apply.

About this form

Please complete and return this form if you want to request a withdrawal from your Trustee Investment Plan.

Return address:
Flexible Retirement Income Servicing Team
Prudential
Lancing
BN15 8GB

Part 1 – Investor details

Name of Scheme

The Trustees of the

Retirement Benefits Scheme

Trustee Investment Plan number

Part 2 – Full withdrawal

Please tick this box if all units held under the Plan are to be encashed

Part 3 – Partial withdrawal

How much cash is required? £

Complete this section only if you wish to specify the funds in which units are to be cancelled. If this section is not completed Prudential will automatically cancel an equal proportion of units in each fund.

Complete as appropriate

Fund	Amount to be withdrawn	% to be cancelled
Managed	<input type="text"/>	<input type="text"/>
Others (please state)	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Part 4 – Scheme Bank Account Details

Please provide scheme bank account details as we cannot make payments direct to member.

Wherever possible, payment will be made to the scheme bank account using the Banks Automated Clearing System (BACS). Please provide the scheme bank details below.

Where payment cannot be made by BACS or you do not complete the bank details below, we will send a cheque payable to the scheme bank account.

Name of account holder

Name and address of Bank/Building Society

Sort code

 – –

Account Number

Part 5 – Declaration

We declare that we are entitled to the proceeds from this Plan and request payment in favour of the investor to be made in terms of the Plan Rules.

We understand that if this Plan is invested in a PruFund Protected fund and we withdraw any amount from this fund before the Guarantee Date, the Guaranteed Minimum Fund will reduce proportionately. If the entire PruFund Protected fund is taken before the Guarantee Date, the guarantee will be lost.

Two Trustees or other Signatories authorised by the Scheme Documentation must sign. At least one of these signatories should be on behalf of the Managing Trustees.

Signature of Trustee 1

Date

Signature of Trustee 2

Date

Prudential use only

Ref

Date