

Retirement has more potential with

PRUDENTIAL

Alteration form – Income Drawdown

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.

About this form

This form can be used to:

- change or cancel any regular Income Drawdown instructions you gave previously.
- apply for a one-off Drawdown payment.
- change fund selection for regular Drawdown payments.
- change bank account details

If you have any questions about this form, you can call us free on **0808 100 3429** between 9am and 5pm Monday to Friday. Calls may be monitored or recorded for quality and security purposes.

Please complete the appropriate part in this form and sign the Declaration in part 6. There are notes in the Application Folder to help you complete this form.

Please return all 4 pages of this form in the enclosed reply paid envelope to:
FRIS Team, Prudential, Stirling FK9 4UE.

Part 1 – Personal details

Forename(s)

Surname

National Insurance Number

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Policy Number

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Part 2 – Alteration to existing Drawdown instructions

If you want to give new instructions for regular Drawdown payments to you, or to apply for a one-off payment, please show your revised instructions. Please use part 2(a) to start, increase, reduce or change the frequency of regular payments. Part 2(b) should be used to stop regular payments. Your revised instructions will be applied unless there is any problem because of HM Revenue & Customs rules – in which case you will be advised.

a. Regular Payments

➤ new amount of regular payment £

➤ new regular payment frequency Monthly Quarterly Half Yearly Yearly

➤ first payment date for your new regular Drawdown instruction. If you selected regular withdrawals for Drawdown, units will be realised evenly across the investment funds you selected, in proportion to the individual fund values, unless you confirm otherwise.

Do you want units encashed from a particular fund, leaving other investment funds intact? Yes No

If **yes**, which fund?

b. Stop regular Drawdown

➤ Please tick this box if you want to stop regular Drawdown payments

Part 3 – Additional one-off Drawdown payment

Please complete this part if you want to apply for a one-off payment. Your request will be applied unless there is any problem because of HM Revenue & Customs rules – in which case you will be advised.

➤ amount of additional payment gross amount £ **or** net amount £
 All drawdown payments are subject to the maximum amounts set out by the HMRC rules.

➤ investment funds from which the one-off payment is to be realised.
 Units will be encashed evenly from across the investment funds you selected in proportion to the individual fund values, unless you confirm alternative details in the box below.

Fund Name	% or amount	
Total	100%	

Additional payments will be paid by cheque.

Please use only whole percentage figures

Part 4 – Fund selection for regular Drawdown payments

If you selected regular withdrawals for Drawdown, units will be encashed evenly from across the investment funds you selected, in proportion to the individual fund values, or from a particular fund you select. You can also alter this fund selection.

Do you want money taken from a particular fund, leaving other investment funds intact? Yes No

If **yes**, which fund?

Part 5 – Change of bank account details for Drawdown payments

If you want to alter the Bank or Building Society account to which your Drawdown payments are made, please show the revised details below. These details must be for an account in your own name or for a joint account where you are one of the account holders.

Name of Account Holder

Name and Address of Bank/Building Society

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

Sort Code

 - -

Account Number

Part 6 – Declaration

How We Use Your Data

For a copy of your Data Protection Notice please refer to your original application form. If you have any questions about this please write to:

The Information Risk & Privacy Team,
The Prudential Assurance Company Ltd,
3 Sheldon Square,
London, W2 6PR.

Please arrange for my Income Drawdown instructions to be altered, or applied, as detailed in this form.

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Copies of the plan terms and conditions and the completed application form are available on request.

Prudential Use Only

REF Date

D	D	M	M	Y	Y	Y	Y
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www.pru.co.uk

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