



Regular withdrawal request form

Notes to help you

This form lets you take regular withdrawals from Prudential International Investment Portfolio, Portfolio Account or Prudence Portfolio Bond.

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

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 your application.

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

Section A – Personal details

Bond number

Policyholder(s)

Section B – Information

Please read the following notes before completing 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. For more information please read your Statement of Charges.
- 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're not sure as to how your withdrawal will be taxed please speak to 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 need 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 allowed 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 Please provide up to date proof of identity and address verification for each policyholder. A certified copy of a utility bill or bank statement dated within the last 6 months will satisfy the address verification requirement. If the payee account is jointly owned, we will need 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 don't 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 can't 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

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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 more 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, for the account to which funds are to be sent.

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 £6.

Payments can't be made until full Bank Account verification is received.

Section C – Withdrawal details – continued

If your account is a UK Bank account and you are resident outside of the UK please check with your Bank that they can accept your payment.

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

- The bond belongs to me/us.
- No other person has an entitlement of any kind in respect of the bond overriding or restricting my/our entitlement in any way.
- I/We have authority to request this transaction.

Capacity (please tick appropriate box)

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

(eg power of attorney etc)

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Address

Postcode

Is this a change of address?

Yes No

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, a life assurance company operating from Ireland. Registration No. 209956. Prudential International Assurance plc is authorised by the Central Bank of Ireland. Prudential International is part of the same corporate group as The Prudential Assurance Company Limited. Both The Prudential Assurance Company Limited and Prudential International are direct and indirect subsidiaries respectively of M&G plc, a company incorporated in the United Kingdom. The Prudential Assurance Company Limited is not affiliated in any manner with Prudential Financial, Inc, a company whose principal place of business is in the United States of America or Prudential plc, an international group incorporated in the United Kingdom.