PRUDENTIAL

Withdrawing money from your Drawdown Plan

About this form

Please use this form if you wish to withdraw money from your Drawdown Plan.

Please complete in full, including your signature on page 3, and return to:

Flexible Retirement Income Servicing Team
Prudential
Lancing
BN15 8GB.

How to fill in 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.

If you need more space to give details on any of the questions, please continue on a separate sheet, cross-referring to the section. As you complete the form, please read the notes which are there to help you.

1. Your details

Surname

Full forenames

Plan number

Telephone number

2. Your money withdrawal

1. Please indicate the type of withdrawal(s) you'd like to make. Please tick all that apply.

☐ One-off withdrawal
☐ Half-yearly
☐ Monthly
☐ Yearly
☐ Quarterly

2. How much money would you like to withdraw? If you'd like to withdraw money from different plan numbers, please state the amount to be withdrawn from each plan. If you'd also like to withdraw from specific funds please include these (otherwise the money will be taken proportionately across all funds you're invested in).

Please note that this money withdrawal will be before tax. Any tax payable will be deducted from this amount.

Amount (£)	Plan number	Fund name	Type of withdrawal (e.g one-off)

3. Start date D D M M Y Y Y Y

If you'd like to receive your money as soon as possible, please use today's date. However, please be aware that it may take up to 3 weeks before you receive this withdrawal.

Please note: We may have to apply an Emergency Tax Code for any lump sum payments made to you. This means that the payment will not take account of your actual tax position and you could end up overpaying tax by a significant amount. You'll be able to claim a refund from HMRC.

3. Any change to Bank/Building Society payment details?

If you want to alter the Bank or Building Society account to which your payments are made, please include 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 Bank/Building Society

Sort code

Account holder(s) name(s)

Account number

For payment to an overseas bank account please provide full bank details below. A Global Disbursements form will also need to be completed. We'll send this out to you once we've received your completed form.

Overseas Bank Account details:

4. Adviser Details *(financial adviser to complete)*

Was advice given? Yes No

Registered Individual's Forename

Registered Individual's Surname

Please provide your FCA Individual Reference Number (IRN)

e.g. A B C 1 2 3 4 5

5. Declaration

I request Prudential to carry out the instructions as detailed in this form.

How we use your personal information

For a copy of our latest Data Protection Notice, please visit pru.co.uk/mydata. This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a hard copy to be sent to you by writing to The Data Protection Officer, Customer Service Centre, Lancing BN15 8GB.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

Signature of applicant

Date

D D M M Y Y Y Y

pru.co.uk

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