



## Regular withdrawal request

### Notes to help you

This form enables you to request regular withdrawals from International Prudence Bond (life assured or capital redemption).

This form is divided into sections. **Notes** are provided at the end of each section to help you to complete the section.

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 request.

### Section A – Personal details

Bond number

Policyholder(s)





Telephone number(s)

E-mail address(es)






### Section B – Information

Please read the following notes before completion of this form.

- The minimum amount for each expected withdrawal payment, regardless of frequency, is normally £75, US \$112.50 or €112.50.
- Payments may be made by cheque or direct credit to a nominated bank account. Any method of transfer other than by cheque may attract a charge as noted in the Statement of Charges document.
- If you are in any doubt as to how your regular withdrawal will be taxed you should consult your Financial Adviser BEFORE submitting this request. Tax may be payable where you make a regular withdrawal from your bond. Any tax liability may vary depending on your individual circumstances including, but not limited to, your tax residency status and the size of any regular withdrawal you make from your bond. Prudential International Assurance cannot, under any circumstances, undertake tax calculations for bondholders or their advisers.

#### UK Residents

Withdrawals of more than 5% every year of the total investment may create a chargeable event for UK resident policyholders.

**Please note:** If you have invested in a PruFund Protected Fund, regular withdrawals will erode the Guaranteed Minimum Fund.

Regular withdrawals from a PAC With-Profits Fund may be subject to a Market Value Reduction. Please see your Key Features document for more details.

Any withdrawal is paid in the Cash-in Benefit Currency.

**Please note:** When you start or vary regular withdrawals from your bond, there is a maximum amount you can take in any 12-month period. This is based on a set percentage of either the amount you have paid in or the value of your bond. Please refer to your Statement of Charges document for more information.

Withdrawals will be taken across all funds in proportion and, if you have made more than one investment, in proportion to the value of units in each.

If you have previously cancelled a regular withdrawal request, or you subsequently cancel this request, we reserve the right not to allow regular withdrawals to re-start. This may apply where your bond is invested in any of the PAC With-Profits Funds and we need to exercise this right in order to protect the fund. This does not apply to bonds with numbers starting S6, S7, E6 or E7, which were issued or in process before 9 May 2011. Please see your Key Features document for more information.

This is based on our current understanding of current taxation, legislation and HM Revenue & Customs practice, all of which are liable to change without notice. The impact of taxation (and any tax relief) depends on individual circumstances.

## Section C – Withdrawal details<sup>1</sup>

Please arrange for the following withdrawals to be set up on the bond numbered on the first page:

- a)  every year (please specify amount and currency) OR
- b)  % of my/our total payment into the bond policies OR
- c)  % of the value of my/our bond policies at the date of withdrawal

Date of first withdrawal<sup>2</sup>

D	D	M	M	Y	Y	Y	Y
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 (Please note that this cannot be within the first 30 days after your bond starts)

Frequency of withdrawals ☐ Every month ☐ Every 3 months ☐ Every 6 months ☐ Every year

### For payments by direct credit in £ Sterling to a UK based bank account only<sup>3, 4</sup>

Name of bank or building society

Account name

Address

Postcode

Account number

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Sort code

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IBAN

SWIFT-BIC

**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

### For payments by Telegraphic Transfer<sup>3, 4</sup>

Name of bank or building society

Account name

Address

Postcode

Account number

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Sort code

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IBAN

SWIFT-BIC

### Notes

- <sup>1</sup> We may need to request additional information such as personal identification and address verification to comply with our regulatory obligations.
- <sup>2</sup> Regular income payments will usually reach your account within five working days of the date you have chosen.
- <sup>3</sup> 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 details. Payments being made to locations outside of Europe in currencies other than Euro € and Sterling £ will be made by telegraphic transfer.
- <sup>4</sup> 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, or other suitable document, for the account to which funds are to be sent. We will require certified personal identification and address verification for any joint account holder in order to comply with all legal and regulatory obligations.

## Section D – Authorisation

1. I/We request the Company to proceed on the basis shown in this form.
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.
  - c) I/We have authority to request this transaction.

Capacity (please tick appropriate box)

Policyholder(s) ☐ Trustee(s) <sup>5</sup> ☐ Other (please specify)

(eg financial adviser, power of attorney etc)

Name

Date

Signature

X

Name

Date

Signature

X

Name

Date

Signature

X

Name

Date

Signature

X

Address for correspondence

Postcode

Are you changing your address?

Yes ☐ No ☐

If **Yes**, please send us to date address verification for **each** bondholder, this could be a utility bill or bank statement dated within the last six months.

Are you changing your country of tax residency?

Yes ☐ No ☐

If **Yes**, please tell us your new country of tax residence and complete our Tax Residence Self-Certification Form (INVF11804)

### Notes

<sup>5</sup> Please note this is not available to policyholders in France.



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. Registration No. 209956. Telephone number + 353 1 476 5000. If the Company should become unable to meet its liabilities, the Financial Services Compensation Scheme will protect eligible policyholders habitually resident in the UK when their contract starts, with effect from 1 December 2001. This protection does not extend to externally-linked investments. Prudential International Assurance plc is authorised by the Central Bank of Ireland and is subject to limited regulation by the Financial Conduct Authority for UK business. Details on the extent of our regulation by the Financial Conduct Authority are available from us on request.