



## Regular withdrawal request

### Notes to help you

This form allows you to request regular withdrawals from your International Prudence Bond.

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

Please send the completed form to **Prudential International, Stirling, FK9 4UE, United Kingdom.**

### Section A – Personal details

Bond number

Bondholder(s)





E-mail address(es)





Telephone number(s)



### Section B – Information

Please read the following notes before completion of this form.

- a) The minimum amount for each expected withdrawal payment, regardless of frequency, is normally £75, US \$112.50 or €112.50.
- b) Payments may attract a charge as noted in the Statement of Charges document.

#### Tax warning

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 and you were tax resident in Spain at the time of the policy issue. The rate of tax payable will depend on your residency status at the time you make any withdrawal from your bond. Prudential International Assurance cannot, under any circumstances, undertake tax calculations for bondholders or their advisers.

**Please note:** If you have invested in a PruFund Protected Fund, regular withdrawals will erode the Guaranteed Minimum Fund. Any withdrawal is paid in the Cash-in Benefit Currency.

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.

**Please note:** If you have cancelled a previous regular withdrawal request, we may allow you to re-start these withdrawals at our absolute discretion and reserve the right to refuse any re-start of regular withdrawals.

When you start or vary regular withdrawals from your bond, the yearly amount asked for cannot exceed the higher of:

- 5% of the amount you have paid into the bond policy, or
- 5% of the value of the bond policy at that time.
- 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.

## 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 OR

c)  % of the value of my/our bond 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

### Regular withdrawals will be paid net of any applicable tax.

For regular withdrawals it is Prudential International's policy to transfer funds electronically to your bank account. Payments being made to locations outside of Europe in currencies other than Euro € and Sterling £ will be made by telegraphic transfer<sup>3</sup>.

Please provide full bank details below.

Name of bank:

Account name

Address:


Account number 

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Sort code 

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IBAN

SWIFT-BIC

### Notes

<sup>1</sup> We may require additional information to comply with our regulatory obligations.

<sup>2</sup> Regular income payments will usually reach your account within seven working days of the date you have chosen.

<sup>3</sup> Prudential International does not currently charge for payments made by telegraphic transfer but may do so in the future. In addition, banks including the recipient bank may levy further charges. 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)

Bondholder(s) ☐

Other (please specify)

(power of attorney etc)

Name

Date

D	D	M	M	Y	Y	Y	Y
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Signature

X

Name

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Signature

X

Name

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Signature

X

Name

Date

D	D	M	M	Y	Y	Y	Y
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Signature

X

Address for correspondence


Are you changing your address?

Yes ☐ No ☐

If **Yes**, please send us up 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)



**[www.prudential-international.com](http://www.prudential-international.com)**

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. Telephone number + 353 1 476 5000. Prudential International Assurance plc is authorised by the Central Bank of Ireland.