Personal Investment Portfolio

WEALTHTIME©

Regular Withdrawals Request Form

This Form should be signed and completed if you wish to make regular withdrawals from your Wealthtime Personal Investment Portfolio (PIP).

Please note we can only accept an instruction to pay a fixed monetary amount.

Once signed and completed please return to Wealthtime.

1 Personal Details

Title

Mr ☐ Mrs ☐ Ms ☐ Miss ☐

Other ☐ If 'Other' please state

Forename

Surname

Date of birth

Product number

2 Bank Details for Regular Withdrawals

Please provide details of your bank/building society account into which you wish your PIP regular withdrawal payments to be paid.

Please enclose supporting evidence of these account details in the form of an original bank statement (internet bank statements are not accepted), void cheque or paying in slip which clearly shows the Account name, Sort code and Account number. Your Regular Withdrawal instructions will not be processed without one of these supporting documents.

Please check with your bank/building society that BACS payments can be accepted into this account and that the details below are all they need for this.

Account name

Sort code

Account number

Building society reference number (if applicable)

Bank name and address

Postcode

3 Withdrawal Payment Frequency

Amount of regular withdrawal (£)

I wish to receive my regular withdrawal payments (please tick one box):

Monthly ☐ Quarterly ☐

Half Yearly ☐ Yearly ☐

Regular withdrawal payments are always made on the first business day of the month.

Start date for regular withdrawals:

0 1

4 Disinvestment Instructions

Please note that disinvestments from the Wealthtime Funds List must be placed by your Financial Adviser using the Wealthtime Online Service.

If there are insufficient monies in your designated PIP bank account, it may mean that your regular withdrawal payment cannot be paid on time.

5 Declaration (Important - Please Read)

- I understand that regular withdrawal payments are always made on the first business day of the month.
- I understand that if I wish to start taking regular withdrawals I must notify Wealthtime at least 10 working days before the end of the month, prior to the date the first regular withdrawal payment is to be made.
- I understand that I can vary the frequency and amount of regular withdrawals I receive, but I must notify Wealthtime at least 5 working days before the end of the month, prior to the date the change is to come into effect. (The date the change is to come into effect is always the 1st of the month).
- I understand that I can stop regular withdrawal payments at any time by providing Wealthtime with written instructions at least 10 working days before the end of the month, prior to the date the change is to come into effect.

Client's signature

Print name

Date

If you require this document in an alternative format please contact us.

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