

REGULAR WITHDRAWAL REQUEST FORM

Utmost Wealth Solutions is the brand name used by a number of Utmost companies. This item has been issued by Utmost PanEurope dac.

IMPORTANT NOTES

Please ensure that all sections are fully completed. In this form words in the singular shall include the plural and vice versa.

HOW TO COMPLETE THIS FORM

This form should be **completed by the owner(s)** using **blue or black ink** and **BLOCK CAPITALS**. If you make a mistake, cross it out, put in the correct words and sign your initials next to the correction. **Do not use correction fluid.**

WHAT TO DO WHEN YOU HAVE COMPLETED THIS FORM

Our preference is to receive documentation scanned and emailed. Please return the completed form(s) and supporting suitably certified documentation to Info@UTMOST.ie.

If you are unable to send documentation electronically, it can be posted to Utmost PanEurope dac, Bishop's Square, Redmond's Hill, Dublin 2, Ireland.

PRIVACY STATEMENT

Our Privacy Statement explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how long we keep customer information for, how a customer can obtain details of the information we keep and the choices customers have about how we use that information. You can find a copy at www.utmostinternational.com/privacy-statements or you can request a copy from our Client Relations Team.

USING THE EDITABLE FIELDS?

To ensure your information is saved correctly, we recommend you save the form to your desktop before you start completing the required fields.

A BOND DETAILS

Contract Type (tick one box only)	<input type="checkbox"/> Investment Bond	<input type="checkbox"/> Inheritance Plan
	<input type="checkbox"/> Complete Investment Portfolio	<input type="checkbox"/> Universal Capital Account
	<input type="checkbox"/> UPE Unit Linked Bond	<input type="checkbox"/> Flexible Investment Plan
	<input type="checkbox"/> Portfolio Bond	

Plan Number

B BOND OWNERS - PERSONAL INVESTORS ONLY

	Owner 1	Owner 2
Title (Mr, Mrs, Miss or Other)	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Forenames (in full)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Address (for correspondence)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>

If there is an additional owner of the bond, photocopy the page, complete their details and attach securely to this form.

REGULAR WITHDRAWAL REQUEST FORM

If there is an additional owner of the bond, photocopy the page, complete their details and attach securely to this form.

C

Complete the details below for all of the Trustees/Authorised Signatories who are authorised to give instructions relating to the bond.

If there is an additional trustee authorised signatory, photocopy this page, complete their details and attach securely to this form.

D WITHDRAWAL DETAILS

IMPORTANT INFORMATION

- › The maximum regular withdrawals you may take in any year will depend on the contract type
- › Percentage withdrawal of the fund value is not an option for the Guaranteed With Profit Bond or the Complete Investment Portfolio. We will not pay the regular withdrawal if the calculated figure falls below the minimum amount
- › The cost of telegraphic transfers will be deducted from the regular withdrawal payment before it is paid. So, for example, if you choose a regular withdrawal of £300 to be paid monthly, what will be paid is £300 less the cost of the transaction
- › For the Complete Investment Portfolio, apart from the SMI Portfolio, all withdrawals are taken from the Cash Account. Withdrawals from SMI Portfolio will be taken on a pro rata basis from all the investments if more than one investment has been chosen. Any withdrawal from a With Profits Fund must not exceed the Annual MVR Free Allowance for that fund
- › Depending on the contract type the value of the units cancelled will take account of any Terminal Bonus, Market Value Reduction, Allocation Charge or Surrender Charge that may apply.

A Withdrawal Amount (min amount £200/€300/US\$300) £/€/US\$*

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*Delete as appropriate

OR

B Withdrawal % of Fund Value

	%
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Frequency of withdrawal payments (tick one box only)

☐ Yearly
 ☐ Half-yearly
 ☐ Quarterly
 ☐ Monthly

Start date of regular withdrawal payments

d	d	m	m	y	y	y	y
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PAYMENT DETAILS

The regular withdrawal payments can be made by telegraphic transfer to a Bank or direct credit to a UK Sterling bank or building society account. Payments made by telegraphic transfer will incur a bank charge.

Method of payment

☐ Telegraphic transfer
 ☐ Direct Credit

Address

Postcode

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Account Name

Account Number

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SWIFT/Sort Code

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Building Society Reference Number (if applicable)

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E

DECLARATION

I/We declare that I/we have the authority to give instructions in respect of the above numbered policy.

I/We instruct Utmost PanEurope dac to make regular withdrawal payments in accordance with the details above.

SIGNATURE

Owner/Trustee/
Authorised Signatory 1

Owner/Trustee/
Authorised Signatory 2

Date

d

d

m

m

y

y

y

y

d

d

m

m

y

y

y

y

SIGNATURE

Owner/Trustee/
Authorised Signatory 3

Owner/Trustee/
Authorised Signatory 4

Date

d

d

m

m

y

y

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y

y

If there are any additional bond owners/trustees/ authorised signatories, photocopy this page, complete the details and attach securely to this form.