

# WEALTH INTERACTIVE USER GUIDE

ADVISER – CREATE ONE-OFF WITHDRAWAL OR,  
AMEND REGULAR WITHDRAWAL ASSET

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INTERNATIONAL

Use the search bar in the top right hand corner or navigate to the correct policy using the clients tab.

Hover over the 'Manage withdrawals' and select either:

'Create one-off withdrawal' or

'Amend regular withdrawal assets'.

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WEALTH SOLUTIONS

You were last signed in on **01/07/2022** Financial Adviser Sign off

Client name or client reference or policy number Search

Home **Clients** Portfolios Assets Tools Literature Firm Admin Documents Help

You are here: Home > Clients > Mr Policy Holder Back Edit

Executive Redemption Bond

Policy actions: + Valuation report + Manage premiums + Manage withdrawals + Policy management + Manage dealing + Illustration + Tools

Create one-off withdrawal  
Amend regular withdrawal assets

**Total policy value:**  
**USD 14,227.96** ?  
Value as at **03-Jul-2022** Get current value

**Total policy cash value:**  
**USD 19,000.00** ?  
Value as at **04-Jul-2022** View performance

**Policy summary** Payment summary Latest activity (1) Transaction tracking Documents Assets Asset transfers Deal instructions

Primary policyholder:	Mr Policy Holder	Linked portfolio:	Not linked
Correspondence address:	264137ADDRESS, 264137Place, United Arab Emirates.	Fund adviser:	260464FRSTNM 260464LSTNM
Policy start date:	28/10/2015	Fee Package:	764059
Financial Regulator:	Exempt	Number of policies:	12
Product Company:	Utmost International Isle of Man	Nominees:	Mrs 14071956FRSTNM 14071956MIDNM 14071956SURNM

+ View more details

The indicative value of the policy is displayed on the right, along with the minimum and maximum withdrawal amount.

Read the disclaimer and click 'Proceed'.



One-off withdrawal  
[Exit this process](#)

Making a one-off withdrawal

Through this process you can make a one-off withdrawal from the policy.

Disclaimer

Before completing and submitting this request for a one-off withdrawal you should:

- Be fully aware of the possible tax consequences that may apply to your client if they take money from their policy - this is particularly important for residents of the UK and Spain.
- Understand that the values on the following screens are indicative values. The final figures will depend on market and currency movements.
- Understand that the values on the following screens may be greater than the amount requested due to any outstanding charges deducted in respect of the withdrawal.
- Where there are joint policyholders all parties must agree before we can action this request.
- When funding a withdrawal through the sale of an asset, please ensure you refer to the relevant fund manager if you are unsure of how long the asset will take to settle as your withdrawal cannot be paid until after the asset sale has been completed.

[Return to policy details page](#)

Proceed

How much can I withdraw?	
Policy:	<b>Executive Redemption Bond -</b>
Current indicative value of portfolio fund:	<b>USD 14,227.58</b>
Maximum withdrawal amount:	<b>USD 0.00</b>
Minimum withdrawal amount:	<b>USD 150.00</b>
Withdrawal amount to date:	<b>USD 31,000.00</b>
Please disregard this figure:	<b>USD 0.00</b>

Enter the withdrawal currency and amount.

Click 'Next'.

You can also withdraw by choosing:

- 'Sell assets' (see slide 16)
- 'Surrender policies' (see slide 17)



1. Enter withdrawal amount

Please enter the amount you wish to receive.  
You must complete this if you want to sell assets in proportion to the holdings of the model portfolio.

Select a withdrawal currency and amount

Select withdrawal currency and amount:

GBP

▼

1000

✓

How much can I withdraw?

Next

Select Currency and Amount

You can select the currency in which your client would like to receive their withdrawal amount. You should be aware that if this differs their your account currency they may be subject to currency exchange fluctuations.

Alternative withdrawal methods

Sell assets ?

Surrender policies ?

Select the assets that you would like to sell on behalf of your client in order to meet their withdrawal amount. You can either enter a monetary amount, or a percentage.

Entering 100% next to an asset will sell 100% of the withdrawal amount from that asset, not sell 100% of the asset.

'Save' your choices.

Click 'Next'.

One-off withdrawal  
Exit process

1. Withdrawal amount

2. Select assets

3. Select bank account

4. Review summary

Withdrawal information

Current value of portfolio fund:	GBP 10,793.60
Indicative withdrawal amount:	GBP 500.00
Indicative value of portfolio fund after withdrawal:	GBP 10,293.60

Asset Selection Option:

Self Selected Assets

Assets held by our default custodian

Assets

Within this tab you can select to withdraw from any of the assets that you manage yourself. If you are unsure how long an asset sale will take to settle, please refer to the relevant fund manager as your withdrawal cannot be paid until after the asset sale has completed.

Asset name	Available units	Indicative value	Indicative amount to be withdrawn	% of amount requested
AMAZON COM INC COM USD 0.01	1.000000	GBP 2,447.14	GBP 250.00 <input type="text" value="250.00"/>	50 % <input type="text" value="50"/>
NVIDIA CORP COM US0.001	10.000000	GBP 2,007.06	GBP 250.00 <input type="text" value="250.00"/>	50 % <input type="text" value="50"/>
APPLE INC COM NAV	20.000000	GBP 2,487.27	GBP 0.00 <input type="text" value="0.00"/>	0.00 % <input type="text" value="0.00"/>
ALIBABA GROUP HLDG SPON ADS EACH REP ONE ORD	25.000000	GBP 2,052.88	GBP 0.00 <input type="text" value="0.00"/>	0.00 % <input type="text" value="0.00"/>
PAYPAL HOLDINGS IN COM 0.0001	15.000000	GBP 1,351.33	GBP 0.00 <input type="text" value="0.00"/>	0.00 % <input type="text" value="0.00"/>
GROWGENERATION CORP	100.000000	GBP 724.50	GBP 0.00 <input type="text" value="0.00"/>	0.00 % <input type="text" value="0.00"/>

Key

Select the alert to view information about blocked units.
 Select the alert to view the holdings calculation based on the latest price and foreign exchange if applicable.

Clear

Save

Total withdrawal amount

Indicative withdrawal amount: GBP 500.00

Select which asset(s) you would like your client's withdrawal to be taken from on this page. If you are unsure how long an asset sale will take to settle, please refer to the relevant fund manager as your withdrawal cannot be paid until after the asset sale has completed.

Total: GBP 0.00

Select the bank account you want the withdrawal to be paid into.



### 3. Select bank account

Please select the bank account that you would like your withdrawal to be paid into.

Indicative withdrawal amount: GBP 500.00

Bank account to be used: Select ?

☒ Add a new bank account

Back Next

#### Select bank account

##### Payment details checklist:

Choose the payment method(s) from the options displayed. Be aware that:-

- The withdrawal must go to an account held in the name of the applicant(s)/policyholder(s).
- **Payments to third party bank accounts cannot be set up or amended on the Wealth Interactive website.**
- **Please contact us if the bank account you are searching for is not displayed.**
- Payments to an account within the UK, Jersey, Guernsey, Isle of Man or Gibraltar require a bank account number and sort code.
- Payments to banks outside the UK require a SWIFT or Bank Identifier Code (BIC), and an International bank account number (IBAN). SWIFT and BIC codes are available from the bank or from [www.swiftcodes.org](http://www.swiftcodes.org).
- **When initiating cross-border payments, the central bank of the country you are sending funds to, may require a Purpose of Payment Code to be included with your transaction in order for your payment to be accepted and processed. Failure to provide this in the 'Remittance Details' field may result in your payment being rejected or delayed. Please refer to your bank if in doubt.**

Enter any remittance details.

Click 'Next'.



### 3. Select bank account

Please select the bank account that you would like your withdrawal to be paid into.

Indicative withdrawal amount: GBP 500.00

Bank account to be used: 12345678 ?

☒ Add a new bank account

#### Bank Details

*Account name:	76668399810282015TRUSTDTL
UK sort code:	
SWIFT or BIC code:	CITIAEAD
Bank name:	CITIBANK N.A.
Bank address:	KHALID IBN AL WALID STREET 749 DUBAI
Bank country:	United Arab Emirates
*Currency:	USD
*Account number:	12345678
IBAN:	AE290210000004104016348
Remittance Details:	<div></div>

Back

Next

#### Select bank account

##### Payment details checklist:

Choose the payment method(s) from the options displayed. Be aware that:-

- The withdrawal must go to an account held in the name of the applicant(s)/policyholder(s).
- **Payments to third party bank accounts cannot be set up or amended on the Wealth Interactive website.**
- **Please contact us if the bank account you are searching for is not displayed.**
- Payments to an account within the UK, Jersey, Guernsey, Isle of Man or Gibraltar require a bank account number and sort code.
- Payments to banks outside the UK require a SWIFT or Bank Identifier Code (BIC), and an International bank account number (IBAN). SWIFT and BIC codes are available from the bank or from [www.swiftcodes.org](http://www.swiftcodes.org).
- **When initiating cross-border payments, the central bank of the country you are sending funds to, may require a Purpose of Payment Code to be included with your transaction in order for your payment to be accepted and processed. Failure to provide this in the 'Remittance Details' field may result in your payment being rejected or delayed. Please refer to your bank if in doubt.**

If the client for which the withdrawal is being made **is registered for Wealth Interactive**, go to the next slide.

If the client is **offline**, please go to slide 13.



# THE CLIENT IS ONLINE

## (HAS ACTIVATED THEIR WEALTH INTERACTIVE ONLINE SERVICE ACCOUNT)

On the 'Review summary' page, check all the details input so far are correct.

Enter the reason for the withdrawal.

Choose from:

- House purchase
- Loan repayment
- Alternative investment
- Personal use
- 'Other'.

Confirm you have read the declaration.

Click 'Submit to the client(s) for online approval.

If there are multiple policyholders then all policy holders must confirm the withdrawal online.

You will then see the confirmation screen.

**Reason for withdrawal**

Please enter the reason for this withdrawal.

Reason for withdrawal:

If you have selected 'Other', please enter the details below.

**Declaration**

The statement below will need to be ticked in order to proceed with this request.

☒ I confirm that I have given my client advice before completing this request. I also confirm that the details entered in this request are true and accurate to the best of my knowledge. ☒

[Back](#) [Submit to client\(s\) for online approval](#) [Create Client Withdrawal Approval Form](#)

### Confirmation of your one-off withdrawal

You have successfully requested a one-off withdrawal for your client.

**What happens next?**

The withdrawal request will now be forwarded for internal approval. Once internal approval is received, the withdrawal will then be forwarded to all policyholders to approve. Once all policyholders have approved the withdrawal, we will proceed with the transaction. You can view the progress of this transaction in your transactions feed.

[Finish and return to policy details page](#)

# THE CLIENT IS ONLINE

(HAS ACTIVATED THEIR WEALTH INTERACTIVE ONLINE SERVICE ACCOUNT)

The status changes on your homepage to 'Application sent to client'.

Your client will see a notification on their Wealth Interactive homepage under 'Items for review' asking them to approve the withdrawal.

They will need to review the request, tick the declaration and click on 'Approve'. It will then be sent to Utmost International for processing.

Once it has been approved the status on your homepage will change to 'Awaiting settlement'.

When paid it will say 'Payment Made'.

Latest activity (2)

Pipeline business (10)

Last viewed

Viewing activities since 04/06/2022 Change date range

Showing 46 activity types Edit

Show: All activities Action taken by all All advisers

Date	Activity type	Policy	Policyholder(s)	Action taken by	Assigned adviser	Status
04/07/2022	One off withdrawal	600008849	Mr Policy Holder	Financial Adviser	524676PRFDNM	Application Sent To Client

# THE CLIENT IS OFFLINE

(HAS NOT ACTIVATED THEIR  
WEALTH INTERACTIVE ONLINE  
SERVICE ACCOUNT)

On the 'Review summary' page, check all the details input so far are correct.

Enter the reason for the withdrawal.  
Choose from:

- House purchase
- Loan repayment
- Alternative investment
- Personal use
- 'Other'.

Confirm you have read the declaration.

Select 'Create Client Withdrawal Approval Form'

### Reason for withdrawal

Please enter the reason for this withdrawal.

Reason for withdrawal:

Select

▼

If you have selected 'Other', please enter the details below.

### Declaration

The statement below will need to be ticked in order to proceed with this request.

☒

I confirm that I have given my client advice before completing this request.  
I also confirm that the details entered in this request are true and accurate to the best of my knowledge.

☒

Back

Create Client Withdrawal Approval Form

# THE CLIENT IS OFFLINE

(HAS NOT ACTIVATED THEIR  
WEALTH INTERACTIVE ONLINE  
SERVICE ACCOUNT)

As the client does not have access to  
Wealth Interactive you will need to  
download a copy of the Client  
Withdrawal Approval Form for them to  
sign.

# THE CLIENT IS OFFLINE

(HAS NOT ACTIVATED THEIR  
WEALTH INTERACTIVE ONLINE  
SERVICE ACCOUNT)

When you have the signed form –  
Click back into the policy from your  
Homepage under 'Latest Activity' or  
From the policy screen.

Click on 'Upload now' at the top or  
'Upload client approval' on the right-  
Hand side.

This opens the box that allows you to upload  
a copy of the signed Client Withdrawal  
Approval Form to submit to us.

When the upload is complete the summary will  
show as 'Awaiting signature check by Utmost  
International'.

Once the signature has been verified, the  
status on your homepage will change to  
'Awaiting Settlement'. And finally 'Payment  
Made'.

# Wealth Interactive User Guide

Withdrawal Variations

'Sell assets' route – Next Slide

'Surrender policies' route – Slide 17

# SELL ASSETS ROUTE

You will need to choose which assets the withdrawal will be made from, and enter the amount to be withdrawn from each of these assets to make up the withdrawal amount.

Alternatively you can click on 'Sell all'.

Once you have chosen the assets / transaction account to fund the withdrawal, review slides 7 onwards to see how to select the bank account and submit the withdrawal request.

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One-off withdrawal  
Exit process

1. Sell assets

2. Select bank account

3. Review summary

1. Sell assets

Select the assets that you would like to sell for your withdrawal.

Select a withdrawal currency

Please select the currency of your withdrawal.

Select a withdrawal currency: USD

How much can I withdraw?

Assets held by our default custodian

Within this tab you can select to withdraw from any of the assets that you manage yourself. If you are unsure how long an asset sale will take to settle, please refer to the relevant fund manager as your withdrawal cannot be paid until after the asset sale has completed.

Asset name	Available units	Indicative value	Amount to be withdrawn	Sell all
AMAZON COM INC COM USD 0.01	1.000000	USD 3,225.70	USD 0.00	<input type="checkbox"/>
NVIDIA CORP COM U0.001	10.000000	USD 2,645.60	USD 0.00	<input type="checkbox"/>
APPLE INC COM NAV	20.000000	USD 3,278.60	USD 0.00	<input type="checkbox"/>
ALIBABA GROUP HLDG SPO ADS EACH REP ONE ORD	25.000000	USD 2,706.00	USD 0.00	<input type="checkbox"/>
PAYPAL HOLDINGS IN COM 0.0001	15.000000	USD 1,781.25	USD 0.00	<input type="checkbox"/>
GROWGENERATION CORP	100.000000	USD 955.00	USD 0.00	<input type="checkbox"/>

Key

Select the alert to view information about blocked units.

Select the alert to view the holdings calculation based on the latest price and foreign exchange if applicable.

Clear

Save

# SURRENDER POLICIES ROUTE

'Surrender policies' allows you to make a partial surrender from the policy by surrendering a number of policy segments.

You can 'Enter an amount' you are looking to achieve or 'Select a number of policies' you wish to surrender.

If you choose to 'Enter an amount' the system will automatically calculate the number of policies to be surrendered to achieve the chosen amount.

If you choose to 'Select a number of policies' the system will give you an indicative sale amount to be withdrawn.

Once you have made a choice see slides 6 onwards to see how to select assets, bank account and submit the withdrawal.

The screenshot shows the 'utmost WEALTH SOLUTIONS' interface for a 'One-off withdrawal'. A progress bar at the top indicates four steps: 1. Surrender policies (active), 2. Select assets, 3. Select bank account, and 4. Review summary. Below the progress bar, the title '1. Surrender policies' is followed by the instruction: 'Please enter the amount you wish to receive or the number of policies you would like to surrender.'

The main form area is titled 'Select your withdrawal method'. It contains two radio buttons: 'Enter an amount' (selected) and 'Select a number of policies'. Below these, there is a dropdown menu for currency (GBP) and a text input field for the amount (1000). To the right of the input field is a label 'How many policies can I surrender?'. Below the input field, there is a table with the following data:

Indicative value of policies to be surrendered:	1 policies to be
Indicative total amount being taken from policies (after the deduction of any outstanding charges):	GBP 899.46
The indicative amount to be taken from the remaining policies:	GBP 100.54

To the right of the main form, there is a section titled 'Surrendering Policies' with a warning about tax consequences and a list of instructions. Below this, there is a table titled 'How many policies can I surrender?' with the following data:

Policy:	Executive Redemption Bond - QINE (600008849)
Current value of portfolio fund:	GBP 10,793.60 (12policies)
Maximum withdrawal allowance:	GBP 793.60 (0policies)
Value of each policy:	GBP 899.46
Total policies surrendered:	0policies
Tax deferred allowance:	GBP 0.00

At the bottom right, there is a section titled 'Alternative withdrawal methods' with two input fields: 'Enter withdrawal amount' and 'Sell assets', both with question mark icons.



# Wealth Interactive User Guide

Amend Regular Withdrawal Assets

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Use the search bar in the top right hand corner or navigate to the correct policy using the clients tab.

Hover over the 'Manage withdrawals' and select either 'Amend regular withdrawal assets'.

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You were last signed in on 18/02/2021 [Sign off](#)

Client name or client reference or policy number

Home Clients Portfolios Assets Tools Literature Firm Admin Documents Help

You are here: Home > Clients > European Collective Investment Bond - PRIIPs Assigned advise

European Collective Investment Bond - PRIIPs

Policy actions: [+ Valuation report](#) [+ Manage premiums](#) [+ Manage withdrawals](#) [+ Policy management](#) [+ Manage dealing](#) [+ Illustration](#) [+ Tools](#)

[Create one-off withdrawal](#)  
[Amend regular withdrawal assets](#)

**Total policy value:**  
**GBP 145,215.28** ⓘ  
Value as at 05-Jul-2022

**Total policy cash value:**  
**GBP 137,791.08** ⓘ  
Value as at 06-Jul-2022

**Total adviser payment:**  
**GBP 255.06** ⓘ  
Values valid as of last adviser payment statement

[View performance](#)

Policy summary Payment summary Latest activity (0) Transaction tracking Documents Assets Asset transfers Deal instructions

Primary policyholder:	Ms 559408PRTYNH	Linked portfolio:	Not linked
Correspondence address:	80100002026112019ADRS1, 80100002026112019ADRS2, CITY, Cyprus, ABC123.	Fund adviser:	588152FRSTNH 588152LSTNH
Policy start date:	23/10/2018	Lives assured:	Ms 559408FRSTNH 559408HIDNH 559408SURNH
Financial Regulator:	CBI	Fee Package:	11575701
Product Company:	Utmost PanEurope	Number of policies:	12

[+ View more details](#)

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Check the tick box to confirm the amendment of assets to be used for Regular Withdrawals and click 'Next'.

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Amend regular withdrawal assets

Back

Required information for amending regular withdrawal assets

Amending regular withdrawal assets

Amending the regular withdrawal assets will allow you to change the amount/percentage of the previously selected withdrawal asset(s) that will be used to fund future regular withdrawals from your client's policy. Where applicable the application will be forwarded to your client(s) online to authorise the changes.

☒ I confirm I understand the above statement and I am happy to proceed.

Next

The Client may have multiple Regular Withdrawals, so select the one you want to change.

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Amend regular withdrawal assets

Exit process

1. Select Withdrawal

Please select the withdrawal you would like to amend.

Sequence Number	Description	Amount	Select
RW790159292	Income	7833.28	Select

Select amount and frequency

- You can choose to make a specified annual amount for your policy or a percentage of the initial investment.
- You can choose to take your withdrawals annually, half yearly, quarterly or monthly. The total annual withdrawal amount will be divided by the frequency of the payments you have requested.

Remove any unwanted assets/transaction accounts by clicking the 'X' on the right hand side.



### 1. Regular withdrawal assets

Please specify the asset(s) you would like to take regular withdrawals from.

Existing regular withdrawal details Sequence Number : RW790159292

Description : <b>Income</b>	Withdrawal start date: <b>01/10/2020</b>
Current regular withdrawals: <b>GBP 652.77</b>	Next withdrawal date: <b>01/08/2022</b>
Frequency: <b>Monthly</b>	
Total withdrawals to date: <b>GBP 18,874.59</b>	

**Regular withdrawal amount**

Indicative withdrawal amount: **GBP 652.77**

**Transaction accounts**

EUR	GBP 326.38 (50.00%)	X
-----	---------------------	---

Total: **GBP 326.38**

Assets held by our default custodian

**Transaction accounts**

**Assets**

Within this tab you can select to withdraw from any of the assets that you manage yourself. If you are unsure how long an asset sale will take to settle, please refer to the relevant fund manager as your withdrawal cannot be paid until after the asset sale has completed.

Asset name	Available units	Indicative value	Amount to be withdrawn	% of amount requested
RUSSELL INVEST CO GLOBAL CREDIT GBP-A ACC	1,829.850000	GBP 25,544.71	GBP 0.00	0.00 %
OPENWORLD PLC GLOBAL HIGH DIVIDEND EQUITY I INC. GBP	5.720000	GBP 8,362.07	GBP 0.00	0.00 %
OPENWORLD PLC GLOBAL LISTED INFRASTRUCTURE I IN C GBP	4.143000	GBP 7,313.83	GBP 0.00	0.00 %
RUSSELL INVEST CO GLOBAL BOND GBP-A ACC GBP	914.110000	GBP 16,581.96	GBP 0.00	0.00 %
RUSSELL INVEST CO EMERGING MKTS EQTY I ACC	27.057000	GBP 1,460.27	GBP 0.00	0.00 %

Select the new assets/transaction accounts for future Regular Withdrawals by entering either the amount of percentage(1).

Click on 'Save' (2).

The new assets will appear on the right-hand side (3).

Then click 'Next'.

1. Regular withdrawal assets

2. Review and Submit

1. Regular withdrawal assets

Please specify the asset(s) you would like to take regular withdrawals from.

Existing regular withdrawal details Sequence Number : RW790159292

Description : <b>Income</b>	Withdrawal start date: <b>01/10/2020</b>
Current regular withdrawals: <b>GBP 652.77</b>	Next withdrawal date: <b>01/08/2022</b>
Frequency: <b>Monthly</b>	
Total withdrawals to date: <b>GBP 18,874.59</b>	

Assets held by our default custodian

Transaction accounts

Assets

Within this tab you can select to withdraw from any of the assets that you manage yourself. If you are unsure how long an asset sale will take to settle, please refer to the relevant fund manager as your withdrawal cannot be paid until after the asset sale has completed.

Asset name	Available units	Indicative value	Amount to be withdrawn	% of amount requested
RUSSELL INVEST CO GLOBAL CREDIT GBP-A ACC	1,829.850000	GBP 25,544.71	GBP 163.19	25 %
OPENWORLD PLC GLOBAL HIGH DIVIDEND EQUITY I INC GBP	5.720000	GBP 8,362.07	GBP 163.19	25 %
OPENWORLD PLC GLOBAL LISTED INFRASTRUCTURE I INC GBP	4.143000	GBP 7,313.83	GBP 0.00	0.00 %
RUSSELL INVEST CO GLOBAL BOND GBP-A ACC GBP	914.110000	GBP 16,581.96	GBP 0.00	0.00 %
RUSSELL INVEST CO EMERGING MKTS EQUITY I ACC	27.057000	GBP 1,460.27	GBP 0.00	0.00 %

Regular withdrawal amount

Indicative withdrawal amount: **GBP 652.77**

Assets held by our default custodian

RUSSELL INVEST CO GLOBAL CREDIT GBP-A ACC (25.00%) X

OPENWORLD PLC GLOBAL HIGH DIVIDEND EQUITY I INC GBP (25.00%) X

Transaction accounts

EUR GBP 326.38 (50.00%) X

Total: **GBP 652.76**



1. Regular withdrawal assets



2. Review and submit

## 2. Review and submit

Please review the changes made to the assets for regular withdrawal.

Print summary

Withdrawal summary

Sequence Number :	RW790159292
Description :	Income
Annual withdrawal amount:	GBP 7,833.28
Withdrawal frequency:	Monthly
Potential next payment due:	GBP 652.77 on 01/08/2022 ?

Asset information Edit

Below you will find the details of all assets that your withdrawal will be taken from.

Assets held by our default custodian

% of amount requested: 100.00 %

Asset name	Available units	Available holdings	Amount to be withdrawn	% of amount requested
RUSSELL INVEST CO GLOBAL CREDIT GBP-H-A ACC GBP	1,829.850000	GBP 25,544.71	GBP 652.77	100.00%

Declaration

You have amended the amount/percentage of the withdrawal asset(s) that will be used to fund regular withdrawals from your client's policy.  
Where applicable the application will be forwarded to your client(s) online to authorise the changes.

☒ confirm that I understand these declarations and I am happy to proceed.
 ☒

Back

Submit to Client

Submit to Utmost International

### Review Summary

You need to review the instruction that you have entered to ensure you are happy before you accept the declaration and submit.  
If you want to change any of the details shown in this summary you can click on the edit links at the top of each section.

This brings up the 'Review and submit' screen.

Click 'Edit' if you need to change anything.

When you are happy tick the declaration.

Then click 'Submit to Client' or if you have authority the option to 'Submit to Utmost International' will show too.

# IMPORTANT INFORMATION

[www.utmostinternational.com](http://www.utmostinternational.com)

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

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Registered Office address: Navan Business Park, Athlumney, Navan, Co. Meath, C15 CCW8, Ireland.

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