

IT'S AS EASY AS 1, 2, 3...

TO REQUEST A WITHDRAWAL ON WEALTH INTERACTIVE

You can request a one-off withdrawal in three easy steps through Wealth Interactive, meaning that:

- › your request gets processed more quickly
- › you can be sure we've received all the information we need
- › there won't be any postal delays.

You should always seek financial advice before proceeding with a withdrawal.

TO START WITH...



Select your policy from the homepage of Wealth Interactive.



Select '**New one off withdrawal**' from the 'Withdrawals' drop down menu.

Read the important information and click '**Proceed**'.

STEP 1. SELECT THE AMOUNT TO WITHDRAW

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 10000 How much can I withdraw?

Enter the amount you would like to withdraw. You can see on the screen how much you can withdraw, and you also have the option to sell an asset and withdraw the proceeds or surrender an individual policy.

STEP 2. CHOOSE HOW TO FUND THE WITHDRAWAL

2. Select assets

Select the assets that you would like to sell in order to meet your withdrawal amount.
You can also use any cash available in your transaction accounts.

Withdrawal information

Current value of portfolio fund: **GBP 785,834.96**

Indicative withdrawal amount: **GBP 10,000.00**

Indicative value of portfolio fund after withdrawal: **GBP 775,834.96**

Asset Selection Option: Self Selected Assets

Select which investment asset you'd like to sell to pay for the withdrawal. You can choose to take the withdrawal from your asset with the largest value, or you can select the individual assets you'd like to sell.

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. You can also withdraw any cash available in your transaction accounts, which may mean that you receive your withdrawal sooner. Once we have received and processed your request, we will contact the managers of your chosen assets to request a sale. The time it takes for a trade to complete varies depending on the specific assets that you have chosen to invest into and how regularly they trade. You can obtain information on the trading criteria from the relevant asset managers. When the trade completes (settles), we will authorise and make your payment straight away.

Asset name	Available units	Indicative value	Indicative amount to be withdrawn	% of amount requested
	4,697.592000	GBP 62,112.39 ▲	GBP 0.00	0.00 %
	3,620.415500	GBP 93,445.53 ▲	GBP 0.00	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

Select the assets you would like to sell to pay for the withdrawal. You can select more than one, and you can also take the withdrawal from any available cash you may have by selecting **'Transaction accounts'**.

STEP 3. SELECT THE PAYMENT ACCOUNT

3. Select bank account

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

Indicative withdrawal amount: GBP 10,000.00

Bank account to be used: Add a new bank account

Back Next

Select the bank account you would like the money to be paid to. You can select to add a new bank account; in this situation, for security we will call you to verify the bank account which may delay the withdrawal slightly.

Reason for withdrawal

Please enter the reason for this withdrawal.

Reason for withdrawal:

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

Enter the reason you would like the withdrawal. Ensure you read and agree to the declaration and then click **'Submit'**.

We will start processing the withdrawal immediately and send the money to you in a day or two. If you have instructed us to sell assets, we will only be able to send you the money once we are in receipt of the sale proceeds.

If you need any help with Wealth Interactive, or have any questions, contact your financial adviser or visit: <https://utmostinternational.com/wealth-solutions/online-service-login/wi/>

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

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

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