



WEALTH INTERACTIVE USER GUIDE

CORPORATE TRUSTEE – WITHDRAWALS GUIDE

A WEALTH *of* DIFFERENCE

utmost[™]
INTERNATIONAL

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CORPORATE TRUSTEE – CREATING A ONE- OFF WITHDRAWAL



Select 'My Policies' from your homepage

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WEALTH SOLUTIONS

You were last signed in on 17/08/2022 532796USRNM ▾

Sign off

Member name or member reference or policy number

Search

Home

My Policies

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Approvals

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Help & support

Hello 532796USRNM (532796)

Policy / Member Search

Enter policy reference number or member name

Search

Transactions to review (1)

There is / are 45 outstanding transaction(s) that require approval

View approvals

Indicative value valid as of 21/08/2022

| Policy type ▾ | Policy reference ▾ | Adviser firm ▾ | Member name ▾ | Policy status ▾ | Indicative value |
|---------------|--------------------|----------------|---------------|-----------------|------------------|
| | | | | | |

- Find the policy you would like to take the withdrawal from and click on it.

The screenshot displays the utmost WEALTH SOLUTIONS user interface. At the top, the logo is on the left, and the user's last sign-in date (17/08/2022) and ID (532796USRNM) are on the right, along with a 'Sign off' button. Below this is a search bar for 'Member name or member reference or policy number'. A navigation menu contains links for Home, My Policies, Members, Approvals, Pipeline, Admin, Alerts, and Help & support. The 'My policies' section is active, showing a breadcrumb trail and a message that there are 3936 policies. A search bar for policy reference numbers or member names is present. Below this, a table displays the first 10 policies. The table has columns for Policy type, Policy reference, Adviser firm, Member name, Policy status, and Indicative value. The first row shows a policy of type 'European Collective Investment Bond - PRIIPs' with a reference of '600041212', status 'Contract Issued', and a value of 'GBP 601,710.29'.

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You were last signed in on 17/08/2022 532796USRNM [Sign off](#)

Member name or member reference or policy number [Search](#)

[Home](#) [My Policies](#) [Members](#) [Approvals](#) [Pipeline](#) [Admin](#) [Alerts](#) [Help & support](#)

You are here: [Home](#) > [My policies](#)

My policies

You have a total of **3936 Policies.**


Enter policy reference number or member name [Search](#)

Displaying 1 - 10 of 3936 policies Go to page [Go](#) < [Prev](#) Page 1 of 394 [Next](#) >

10 Policies [All status types](#)

| Policy type | Policy reference | Adviser firm | Member name | Policy status | Indicative value |
|--|------------------|--------------|-------------|-----------------|------------------|
| European Collective Investment Bond - PRIIPs | 600041212 | | | Contract Issued | GBP 601,710.29 |

- On the policy home page, hover over **'Withdrawals'** within policy actions.
- From the dropdown select **'Create one-off withdrawal'**



You were last signed in on **11/08/2022** 537679USRNM ▼ [Sign off](#)

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You are here: [Home](#) > [My policies](#) > [European Executive Investment Bond - PRIIPs \(600040773\)](#) [Back](#)

European Executive Investment Bond - PRIIPs (600040773)

Policy actions:


[+ Policy Valuations](#)
[+ Premiums](#)
[+ Withdrawals](#)
[+ Policy management](#)
[New Deal Instruction](#)

Value of portfolio fund:


GBP 348,675.44 

Value as at **21-Aug-2022** [Get current value](#)

Total money in vs money out:

GBP 358,017.84 

Value as at **22-Aug-2022**

[View performance](#)


Policy Contacts (1)

| | |
|------------|--|
| Name: | 588112FRST_NM 588112LS T_NM |
| Role: | Financial Adviser/Financial Adviser Representative |
| Company: | 559070FRSTNM |
| Telephone: | 58811299991 |
| Email: | abc@tcs.com |

- You can view the maximum amount you can withdraw on the right-hand side of the screen.
- Review further pre-submission information and press '**Proceed**' to begin the withdrawal process.

Making a one-off withdrawal

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

Important information

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

- Speak to your Financial adviser/Financial adviser representative to ensure you are following the most suitable course of action for your circumstances.
- Refer to your policy terms and literature.
- Be fully aware of the possible tax consequences that may apply on taking money from your 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.


[Return to my policy details page](#)

[Proceed](#)

How much can I withdraw?


| | |
|---|---|
| Policy: | European Executive Investment Bond - PRIIPs (600040773) |
| Current indicative value of portfolio fund: | GBP 348,675.44 |
| Maximum withdrawal amount: | GBP 294,972.76 |
| Minimum withdrawal amount: | GBP 100.00 |
| Withdrawal amount to date: | GBP 0.00 |
| Please disregard this figure: | GBP 0.00 |

- Confirm withdrawal currency and amount.
- Select '**Next**'.




One-off withdrawal


[Exit process](#)




1. Enter withdrawal amount



2. Select assets



3. Select bank account



4. Review summary

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?

Next

Select Currency and Amount


You can select the currency in which you would like to receive your withdrawal amount. You should be aware that if this differs from your policy currency you may be subject to currency exchange fluctuations.

Alternative withdrawal methods

Sell assets ?


Surrender policies ?

- Select where the withdrawal will be funded from.
- You can choose between self-selected assets or the asset with largest holding.
- When using self-selected assets you must confirm the amount or percentage to be sold and press '**Save**' and then '**Next**'.
- Furthermore, within self-selected assets you have the option to withdraw from available cash if applicable.



One-off withdrawal

Exit process



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 348,675.44 |
| Indicative withdrawal amount: | GBP 10,000.00 |
| Indicative value of portfolio fund after withdrawal: | GBP 338,675.44 |

Asset Selection Option : Self Selected Assets

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 |
|---|-----------------|------------------|-----------------------------------|-----------------------|
| ISHARES V PLC MSCI WORLD GBP HEDGED UCITS | 994.000000 | GBP 75,856.56 | GBP 10,000.00 | 100 % |

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 10,000.00**

Assets held by our default custodian

ISHARES V PLC MSCI WORLD GBP HEDGED UCITS

GBP 10,000.00
(100.00 %)

Total: GBP 10,000.00

Back

Next

- Confirm the bank account withdrawal is to be paid to.
- If no accounts are listed, press '**Add a new bank account**' and enter required details before pressing '**Next**'.



3. Select bank account

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

*Required information

Indicative withdrawal amount: GBP 10,000.00

Bank account to be used:

Add a new bank account

UK sort code: 559100

Bank name: Isle Of Man Bank Limited, IOM BANK E

Bank address: P.O. Box 13.,
2 Albert St,
Douglas, Isle of Man, IM99 1AN

Bank country: United Kingdom

Account details

Account name: 538030PTYM ATO MW SIPP TRUSTEES LTD
A.T.O MW SIPP 2

*Currency:

*Account:

*Account held for: years months

Remittance details/Payment reference (this will appear on your bank statement):

Not the correct bank?
If this is not the correct bank then search again using the button below.

Select bank account

Payment details checklist:

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

- **IMPORTANT INFORMATION:** Payments to banks outside the UK require an International Bank Account Number (IBAN) and a SWIFT or Bank Identifier Code (BIC). SWIFT and BIC codes are available from the bank or from www.swiftcodes.org.
- 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.
- **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.**
- Please note that for clients holding accounts with Revolut Bank, routing details are required, and therefore payments must not be submitted online using Wealth Interactive.

- Review the withdrawal instruction and once happy, tick the declarations and press **'Submit'**.
- If any sections require amending they can be edited using the **'Edit'** buttons above each section.

4. Review summary

Please review your withdrawal summary and ensure all information is correct before proceeding.

Withdrawal summary Edit

| | |
|---|----------------|
| Indicative value of portfolio fund before withdrawal: | GBP 348,675.44 |
| Indicative withdrawal amount: | GBP 10,000.00 |
| Indicative portfolio fund value after withdrawal: | GBP 338,675.44 |

Asset information Edit

Below you will find the details of all transactions being made to enable your withdrawal When will you get your money? We will usually be able to make the payment to you on the same day if the following statements are true:

- Your funds or assets have been sold, the trades settled and the money I've requested is available.
- Utmost International has your up-to-date bank details and has verified this bank account to be able to pay you your money.
- You have submitted your withdrawal request online for fastest processing and payment.

What happens if your funds or assets haven't been sold yet, or more assets need to be sold to fund your payment? 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.

▼ Assets held by our default custodian
% of amount requested: 100.00 %

| Asset name | Available units | Available holdings | Indicative amount to be withdrawn | % of amount requested |
|---|-----------------|--------------------|-----------------------------------|-----------------------|
| ISHARES V PLC MSCI WORLD GBP HEDGED UCITS | 984.000000 | GBP 75,856.56 | GBP 10,000.00 | 100.00% |

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.

Reason for withdrawal

Please enter the reason for this withdrawal.

Reason for withdrawal: House purchase ▼

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

Declaration

1. I,
 1. authorise and request Utmost PanEurope dac to carry out the transaction detailed in this request in accordance with Utmost International's relevant policy Terms and Conditions.
2. confirm that there is no assignment, or any person or company with a notice or interest in the policy.
3. confirm that there is no Bankruptcy Order against me or any beneficiary (if applicable), nor am I, or the beneficiary, an undischarged bankrupt, or deemed to be insolvent under any relevant insolvency legislation.
4. undertake to indemnify Utmost PanEurope dac against any claims or demands made by any other person or party as a result of this payment request.
5. agree that payment constitutes full discharge of the liability of Utmost PanEurope dac.
6. understand that the value of Allocated Units cancelled to pay for the one-off withdrawal may be greater than the amount of the one-off withdrawal specified in this instruction due to any charges deducted in respect of the one-off withdrawal (such as an Asset Dealing Charge/Investment Charge).
7. confirm that all the information contained in this application is true and correct, and that I am entitled to the legal and/or beneficial interest in the policy unless the policy is subject to a trust or nomination and the beneficiaries are entitled to receive payment in accordance with the provisions.
8. confirm that I have sought financial advice in regards to the potential tax consequences of making this one-off withdrawal from my policy and have referred to the policy terms and literature in respect of this one-off withdrawal.
9. confirm that I am aware of the potential tax consequences of receiving the one-off withdrawal, and I will Declare these proceeds, if applicable, to the relevant tax authority in my country of residence.

Utmost PanEurope dac does not offer legal, tax or financial advice and we can accept no responsibility for any action taken, or refrained from being taken, on the basis of information provided by us. Any information provided is based on our understanding of the current law and practice and is subject to change in the future.

☒ I confirm that I have consulted my financial adviser/financial adviser representative before making a final decision to proceed with this request and I am happy to proceed.

☒

Back
Submit

CORPORATE TRUSTEE - CREATING A REGULAR WITHDRAWAL

(2)

Select 'My Policies' from your homepage

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WEALTH SOLUTIONS

You were last signed in on 17/08/2022

532796USRNM ▼

Sign off

Member name or member reference or policy number

Search

Home

My Policies

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Approvals

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Admin

Alerts

Help & support

Hello 532796USRNM (532796)

Policy / Member Search

Enter policy reference number or member name

Search

Transactions to review (1)

There is / are 45 outstanding transaction(s) that require approval

View approvals

Indicative value valid as of 21/08/2022

| Policy type ▼ | Policy reference ▼ | Adviser firm ▼ | Member name ▼ | Policy status ▼ | Indicative value |
|---------------|--------------------|----------------|---------------|-----------------|------------------|
| | | | | | |

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A WEALTH *of* DIFFERENCE

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- Find the policy you would like to take the withdrawal from and click on it.

The screenshot displays the utmost WEALTH SOLUTIONS user interface. At the top, the logo is on the left, and the user's last sign-in date (17/08/2022) and ID (532796USRNM) are on the right, along with a 'Sign off' button. Below this is a search bar for 'Member name or member reference or policy number'. A navigation menu includes 'Home', 'My Policies', 'Members', 'Approvals', 'Pipeline', 'Admin', 'Alerts', and 'Help & support'. The 'My policies' section is active, showing a breadcrumb 'You are here: Home > My policies' and a summary 'You have a total of 3936 Policies.' Below this is another search bar for 'Enter policy reference number or member name'. The main content area shows a table of policies. The table has columns for 'Policy type', 'Policy reference', 'Adviser firm', 'Member name', 'Policy status', and 'Indicative value'. The first row shows a policy type of 'European Collective Investment Bond - PRIIPs', a reference of '600041212', and an indicative value of 'GBP 601,710.29'.

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WEALTH SOLUTIONS

You were last signed in on 17/08/2022 532796USRNM Sign off

Member name or member reference or policy number Search

Home My Policies Members Approvals Pipeline Admin Alerts Help & support

You are here: Home > My policies

My policies

You have a total of 3936 Policies.


Enter policy reference number or member name Search

Displaying 1 - 10 of 3936 policies Go to page Go < Prev Page 1 of 394 Next >

10 Policies All status types

| Policy type | Policy reference | Adviser firm | Member name | Policy status | Indicative value |
|--|------------------|--------------|-------------|-----------------|------------------|
| European Collective Investment Bond - PRIIPs | 600041212 | | | Contract Issued | GBP 601,710.29 |

- On the policy home page, hover over '**Withdrawals**' within policy actions.
- From the dropdown select '**Create Regular Withdrawal**'.



You were last signed in on **11/08/2022** 537679USRNM ▼ [Sign off](#)

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You are here: [Home](#) > [My policies](#) > [European Executive Investment Bond - PRIIPs \(600040773\)](#) [Back](#)

European Executive Investment Bond - PRIIPs (600040773)

Policy actions:


[+ Policy Valuations](#)
[+ Premiums](#)
[+ Withdrawals](#)
[+ Policy management](#)
[New Deal Instruction](#)

Value of portfolio fund:


GBP 348,675.44 

Value as at **21-Aug-2022**
[Get current value](#)

Total money in vs money out:

GBP 358,017.84 

Value as at **22-Aug-2022**

[View performance](#)


Policy Contacts (1)

| | |
|------------|--|
| Name: | 588112FRST_NM 588112LS T_NM |
| Role: | Financial Adviser/Financial Adviser Representative |
| Company: | 559070FRSTNM |
| Telephone: | 58811299991 |
| Email: | abc@tcs.com |

Please read the important information and guidance notes before proceeding.

Create a regular withdrawal

Through this process you can create a regular withdrawal from your policy.

Important Information

Before completing and submitting this regular withdrawal request you should:

- Speak to your Financial adviser/Financial adviser representative to ensure you are following the most suitable course of action for your circumstances.
- Refer to your policy terms and literature.
- Be fully aware of the possible tax consequences that may apply on taking money from your policy - this is particularly important for residents of the UK or Spain.

Creating a regular withdrawal

- Where permitted, you can create regular withdrawals from your policy. Please note that these are not permitted in some countries, e.g. Belgium.
- You can choose to take a specified amount from your policy or a percentage of the initial investment as well as any top-ups.
- You can choose to take your withdrawals annually, every two months, four monthly, half yearly, monthly or quarterly. The total annual amount will be divided by the frequency of the payments you have requested.

Existing withdrawals on the policy

You can amend an existing withdrawal from here if required. Please be aware that changes will only be made to the withdrawal once all policyholders have approved the amendment.

| Sequence number ? | Currency | Amount per year | % of amount considered for withdrawal ? | Frequency | Amount per frequency | Amend |
|-------------------|----------|-----------------|---|-----------|----------------------|-------|
| No records found. | | | | | | |
| | | | | | | |

Cancel

Proceed

- Within '**Withdrawal details**' select whether withdrawal is for income or fees, followed by the currency and frequency of the withdrawal.
- Then select how you would like to confirm the withdrawal amount using the options provided. Followed by selecting the amount and start date.
- Press '**Next**' to proceed.

1. Enter withdrawal amount

Please select the desired amount and frequency of this withdrawal.

*Required information

How much can I withdraw?

| | |
|--|---|
| Policy: | European Executive Investment Bond - PRIIPs (600040773) |
| Current indicative value of portfolio funds: | GBP 348,675.44 |
| Current amount considered for withdrawal: | GBP 358,017.84 ? |
| Maximum withdrawals: | GBP 294,972.76 |
| Minimum withdrawal per payment: | GBP 500.00 |
| Withdrawal amount to date: | GBP 0.00 |

Withdrawal details

*Description : Income

*Currency: GBP

*Withdrawal frequency: Quarterly

*I want to:

☒ Specify a quarterly amount

☐ Specify an annual amount

☐ Specify an annual percentage of total premium invested

*Quarterly Amount: GBP 500

There may be tax implications of setting up regular withdrawals from your policy, for example the withdrawals may be taxed as income, or have other tax disadvantages in their country of residence. You may also need to ensure that the withdrawals are within any tax allowances that may apply before additional tax charges apply. Please consult your financial adviser for further details.

*Regular withdrawal start date: 14 June 2023

If the regular withdrawal start date has passed before we process this request, we will arrange a one-off payment for the missed amount and start the regular payment for the next payment date.
If your chosen payment date falls on a non-working day:
For Discounted Gift Trust (DGT) Policies: we will pay it to you on the next working day.
For non-DGT policies: we will pay it to you on the first working day prior.

Withdrawal summary

Indicative Annual withdrawal amount : GBP 2000.00

Indicative quarterly withdrawal amount : GBP 500.00

Requested start date: 14/6/2023

Back
Next

Select which assets are going to fund the withdrawal, confirming either a percentage or monetary amounts.

1. Enter withdrawal amount

2. Select assets

3. Select bank account

4. Review summary

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.

*Required information

*How will the withdrawal be funded?

Choose assets

Please ensure you are aware of any tax implications of taking a regular withdrawal from their policy. There may also be a charge on the asset from which you are withdrawing, for example if you were to withdraw from a fixed-term deposit. You should also be aware that taking money out of your policy can dramatically reduce its growth potential. If you are unsure how this may affect you, please speak to your financial adviser.

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 | Available holdings | Amount to be withdrawn | % of amount requested |
|---|-----------------|--------------------|------------------------|-----------------------|
| ISHARES V PLC MSCI WORLD GBP HEDGED UCITS | 984.000000 | GBP 75,856.56 ▲ | GBP 500.00 | 100 % |
| ISHARES IV PLC AUTO & ROBOTICS UCITS ETF U | 3,904.000000 | GBP 34,823.68 ▲ | GBP 0.00 | 0.00 % |
| ISHARES IV PLC HEALTHCARE INNOVATION UCITS | 5,830.000000 | GBP 36,481.23 ▲ | GBP 0.00 | 0.00 % |
| ROBECO LUX SA GLOBAL CONSUMER TRENDS EQ F ACC | 139,248700 | GBP 33,851.36 ▲ | GBP 0.00 | 0.00 % |
| L&G ALL COMMODITIES UCITS ETF | 6,184.000000 | GBP 71,054.16 ▲ | 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

Back

Next

Summary

Indicative quarterly withdrawal amount:

GBP 500.00

Assets held by our default custodian

ISHARES V PLC MSCI WORLD GBP 500.00 (100.00 %)

X

Total:

GBP 500.00

- Confirm the bank account the withdrawal is to be paid to.
- If no accounts are listed, press '**Add a new bank account**' and enter required details before pressing '**Next**'.



3. Select bank account

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

*Required information

Indicative quarterly withdrawal amount: GBP 500.00

Bank account to be used: 12345678 ☒

Bank Details

| | |
|--|--------------------------|
| *Account name: | 81006884307122020TRUSTDL |
| UK sort code: | 000002 |
| SWIFT or BIC code: | |
| Bank name: | Test Wizard |
| Bank address: | address 01 |
| Bank country: | United Kingdom |
| *Currency: | GBP |
| *Account number: | 12345678 |
| IBAN: | |
| Payment reference (this will appear on your bank statement): | <input type="text"/> |
| | <input type="text"/> |
| | <input type="text"/> |

Payment method

Payment method: Bank Transfer ☒

Select bank account

Payment details checklist:

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

- **IMPORTANT INFORMATION:** Payments to banks outside the UK require an International Bank Account Number (IBAN) and a SWIFT or Bank Identifier Code (BIC). SWIFT and BIC codes are available from the bank or from www.swiftcodes.org.
- 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.
- 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.
- Please note that for clients holding accounts with Revolut Bank, routing details are required, and therefore payments must not be submitted online using Wealth Interactive.



4. Review summary

Please review your withdrawal summary and ensure all information is correct before proceeding.

Print summary

Withdrawal summary

Edit

| | | |
|------------------------------|--------------|--|
| Description : | Income | |
| Annual withdrawal amount: | GBP 2,000.00 | |
| Quarterly withdrawal amount: | GBP 500.00 | |
| Requested start date: | 14/06/2023 | |

Asset information

Edit

Below you will find the details of all transactions being made to enable your withdrawal. When will you get your money? We will usually be able to make the payment to you on the same day if the following statements are true:

- Your funds or assets have been sold, the trades settled and the money I've requested is available.
- Utmost International has your up-to-date bank details and has verified this bank account to be able to pay you your money.
- You have submitted your withdrawal request online for fastest processing and payment.

What happens if your funds or assets haven't been sold yet, or more assets need to be sold to fund your payment? 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.

► Assets held by our default custodian % of amount requested: 100.00 %

Review Summary

You need to review this instruction to ensure you are happy before you accept the declaration and submit/approve the instruction.

If you want to change any of the details shown in this summary you can select the 'Edit' links at the top of each section. If you do not now want it to go ahead select 'Exit process' above.

Declaration

- I,
 - authorise and request Utmost PanEurope dac to carry out the transaction detailed in this request in accordance with my policy terms.
 - understand that the value of Allocated Units cancelled to pay for the regular withdrawals may be greater than the amount of the regular withdrawals specified in this instruction due to any charges deducted in respect of the regular withdrawals (such as an Asset Dealing Charge/Investment Dealing Charge).
 - confirm that all the information contained in this form is true and correct and that I am entitled to the legal and/or beneficial interest in the policy unless the policy is subject to a trust or nomination and the beneficiaries are entitled to receive payment in accordance with the provisions.
 - confirm that there is no Bankruptcy Order against the policyholder or beneficiary (if applicable) nor are they an undischarged bankrupt or deemed to be insolvent under any relevant insolvency legislation.
 - undertake to indemnify Utmost PanEurope dac against any claims or demands made by any other person or party as a result of the payment requested in this request.
 - agree that payment of the partial or total surrender proceeds shall constitute full discharge of the liability of Utmost PanEurope dac.
 - confirm that I have sought financial advice in regards to the potential tax consequences of making these regular withdrawals from my policy and I have referred to the policy terms and literature in respect of these regular withdrawals.

☒ I confirm that I have consulted my financial adviser/financial adviser representative before making a final decision to proceed with this request and I am happy to proceed.



Back

Submit

- Within this section you will have the ability to print a copy of the summary if a copy needs to be stored internally.
- Review the instruction created and tick to confirm declaration then press '**Submit**'
- Once this has been submitted, this will be sent to the relevant Corporate Trust approvers before being placed by Utmost International.

CORPORATE
TRUSTEE -
AMENDING AN
EXISTING
REGULAR
WITHDRAWAL

(3)

- Within the policy home page, hover over '**Withdrawals**' within policy actions
- From the dropdown select '**Amend regular withdrawal**'.

The screenshot displays the utmost WEALTH SOLUTIONS user interface. At the top right, it shows the user is signed in on 11/08/2022 with ID 537679USRNM and a 'Sign off' button. A search bar is available for member names, references, or policy numbers. The main navigation bar includes links for Home, My Policies, Members, Approvals, Pipeline, Admin, Alerts, and Help & support. The breadcrumb trail indicates the user is in 'Home > My policies > European Executive Investment Bond - PRIIPs (600040773)'. The policy title is 'European Executive Investment Bond - PRIIPs (600040773)'. Below this, a 'Policy actions:' section contains links for Policy Valuations, Premiums, Withdrawals, Policy management, and New Deal Instruction. Two summary boxes are shown: 'Value of portfolio fund: GBP 348,675.44' (as of 21-Aug-2022) and 'Total money in vs money out: GBP 358,017.84' (as of 22-Aug-2022). A 'View performance' link with a line chart icon is also present. A 'Policy Contacts (1)' section lists the Financial Adviser/Financial Adviser Representative: Name: 588112FRST_NM 588112LS T_NM, Role: Financial Adviser/Financial Adviser Representative, Company: 559070FRSTNM, Telephone: 58811299991, and Email: abc@tcs.com.

Check existing withdrawals on this policy and press '**Amend**' on the withdrawal you would like to change.

Amend regular withdrawal

Through this process you can amend a regular withdrawal that is linked to your policy.

Important Information

Before completing and submitting this regular withdrawal request you should:

- Speak to your Financial adviser/Financial adviser representative to ensure you are following the most suitable course of action for your circumstances.
- Refer to your policy terms and literature.
- Be fully aware of the possible tax consequences that may apply on taking money from your policy, this is particularly important for residents of the UK and Spain.

Please note;

- If this policy has a withdrawal due within the next 6 working days, any new instruction will take effect after that withdrawal.
- If the date for a withdrawal falls on a non working day, then the withdrawal will be made on the next working day.

Amend a regular withdrawal

- You can change the amount, frequency, date and asset used for your regular withdrawals.
- You are also able to change the bank account associated with your regular withdrawals.

Existing withdrawals on the policy

Select the withdrawal that you would like to amend.

| Sequence number ? | Currency | Amount per year | % of amount considered for withdrawal ? | Frequency | Amount per frequency | Amend |
|-------------------|----------|-----------------|---|-----------|----------------------|-------|
| RW800869610 | GBP | 1100.00 | 0.31 | Annually | 1100.00 | Amend |

[Return to my policy details page](#)



1. Select withdrawal amount and frequency

Please select the desired amount and frequency of this withdrawal.

*Required information

How much can I withdraw?

| | |
|---|---------------------------------------|
| Policy: | Executive Redemption Bond (600029297) |
| Current indicative value of portfolio fund: | GBP 391,424.45 |
| Current amount considered for withdrawal: | GBP 360,000.00 ? |
| Maximum withdrawal allowance: | GBP 337,424.45 |
| Minimum withdrawal amount: | GBP 500.00 |
| Withdrawal amount to date: | GBP 5,954.20 |

Withdrawal frequency

| | | |
|---|---|---|
| *Description : | Trustee Fee | ✓ |
| *Currency: | GBP | ✓ |
| *Withdrawal frequency: | Annually | ✓ |
| I want to: | <input checked="" type="radio"/> Annual withdrawal amount <input type="radio"/> Specify an annual percentage of total premium invested | |
| *Annual withdrawal amount: | GBP 680.00 | ✓ |
| <small>There may be tax implications of setting up regular withdrawals from your policy, for example the withdrawals may be taxed as income, or have other tax disadvantages in their country of residence. You may also need to ensure that the withdrawals are within any tax allowances that may apply before additional tax charges apply. Please consult your financial adviser for further details.</small> | | |
| *Regular withdrawal start date: | 1 September Year | |

Select amount and frequency

- Please be aware that transactions conducted in different currencies will be subject to currency movements and currency exchange costs.
- You can choose to take a specified annual amount or a percentage of the premium invested for withdrawals.
- You can choose to take your withdrawals annually, bi monthly, four monthly, half yearly, monthly and quarterly. The total annual withdrawal amount will be divided by the frequency of the payments you have requested.

Review withdrawal description, currency, frequency, amount and date and amend where required.

Confirm new regular withdrawal start date and press '**Next**'.

*Regular withdrawal start date:

1


▼


September

▼

2023

▼





If the regular withdrawal start date has passed before we process this request, we will arrange a one-off payment for the missed amount and start the regular payment for the next payment date.
If your chosen payment date falls on a non-working day:
For Discounted Gift Trust (DGT) Policies: we will pay it to you on the next working day.
For non-DGT policies: we will pay it to you on the first working day prior.

Withdrawal summary

Indicative Annual withdrawal amount :

GBP 680.00

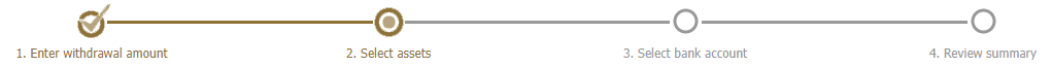
Requested start date:

1/9/2023

Back

Next

- Select which assets are going to fund the withdrawal, confirming either percentage or monetary amounts using the assets table.
- Then click '**Next**'.



2. Select assets

On this page you can select the assets you wish to use for your withdrawal.

*Required information

***How will the withdrawal be funded?** Self Selected Assets

Please ensure you are aware of any tax implications of taking a regular withdrawal from their policy. There may also be a charge on the asset from which you are withdrawing, for example if you were to withdraw from a fixed-term deposit. You should also be aware that taking money out of your policy can dramatically reduce its growth potential. If you are unsure how this may affect you, please speak to your financial adviser.

Transaction accounts

Within this tab you can select to withdraw from a transaction account.

| Transaction account currency | Available balance ? | Indicative amount to be withdrawn | % of amount requested |
|------------------------------|---------------------|-------------------------------------|-----------------------------------|
| GBP | GBP -3.43 | <input type="text" value="340.00"/> | <input type="text" value="50"/> % |
| AUD | GBP 0.00 | <input type="text" value="340.00"/> | <input type="text" value="50"/> % |

Summary

Indicative annual withdrawal amount: **GBP 680.00**

Transaction accounts

| | | |
|-----|----------------------|---|
| GBP | GBP 340.00 (50.00 %) | × |
| AUD | GBP 340.00 (50.00 %) | × |

Total: **GBP 680.00**

Authorised custodians

Back

Next

- Confirm the bank account the withdrawal is to be paid to.
- If no accounts are listed, press '**Add a new bank account**' and enter required details before pressing '**Next**'.



3. Select bank account

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

*Required information

Indicative annual withdrawal amount: GBP 680.00

Bank account to be used:

12345678

?

Add a new bank account

☒

Bank Details

| | |
|--|--|
| *Account name: | 81679185420072021TRUSTDTL |
| UK sort code: | 000002 |
| SWIFT or BIC code: | |
| Bank name: | Test Wizard |
| Bank address: | address 01 |
| Bank country: | United Kingdom |
| *Currency: | GBP |
| *Account number: | 12345678 |
| IBAN: | |
| Payment reference (this will appear on your bank statement): | <div>1027 K Whatling</div> <div></div> <div></div> <div></div> |

Select bank account

Payment details checklist:

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

- **IMPORTANT INFORMATION:** Payments to banks outside the UK require an International Bank Account Number (IBAN) and a SWIFT or Bank Identifier Code (BIC). SWIFT and BIC codes are available from the bank or from www.swiftcodes.org.
- 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.
- **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.**
- Please note that for clients holding accounts with Revolut Bank, routing details are required, and therefore payments must not be submitted online using Wealth Interactive.



4. Review summary

Please review your withdrawal summary and ensure all information is correct before proceeding.

Print summary

Regular withdrawals summary

[Edit](#)

| | |
|------------------------------|------------------------------|
| Description: | Trustee Fee |
| Annual withdrawal amount: | GBP 680.00 ? |
| Potential next payment date: | 01/09/2023 ? |

Asset information

[Edit](#)

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

► Transaction accounts % of amount requested: 100.00 %

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.

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.

Declaration

- I,
- authorise and request Utmost International Isle of Man Limited to carry out the transaction detailed in this request in accordance with my policy terms.
 - understand that the value of Allocated Units cancelled to pay for the regular withdrawals may be greater than the amount of the regular withdrawals specified in this instruction due to any charges deducted in respect of the regular withdrawals (such as an Asset Dealing Charge/Investment Dealing Charge).
 - confirm that all the information contained in this form is true and correct and that I am entitled to the legal and/or beneficial interest in the policy unless the policy is subject to a trust or nomination and the beneficiaries are entitled to receive payment in accordance with the provisions.
 - confirm that there is no Bankruptcy Order against the policyholder or beneficiary (if applicable) nor are they an undischarged bankrupt or deemed to be insolvent under any relevant insolvency legislation.
 - undertake to indemnify Utmost International Isle of Man Limited against any claims or demands made by any other person or party as a result of the payment requested in this request.
 - agree that payment of the partial or total surrender proceeds shall constitute full discharge of the liability of Utmost International Isle of Man Limited.
 - confirm that I have sought financial advice in regards to the potential tax consequences of making these regular withdrawals from my policy and I have referred to the policy terms and literature in respect of these regular withdrawals.

☒ I confirm that I have consulted my financial adviser/financial adviser representative before making a final decision to proceed with this request and I am happy to proceed.



[Back](#)

[Submit](#)

- Review information input, tick declaration and press '**Submit**'.
- If any sections are incorrect they can be edited using the '**Edit**' buttons above each section.



CORPORATE TRUSTEE - SUBMITTING A FULL SURRENDER

- Within policy home page, hover over '**Policy management**' within policy actions
- From the dropdown select '**Surrender Policy**'.

The screenshot displays the utmost WEALTH SOLUTIONS user interface. At the top right, it shows the user's last login on 11/08/2022 with ID 537679USRNM and a 'Sign off' button. Below this is a search bar for member names or policy numbers. A navigation menu includes links for Home, My Policies, Members, Approvals, Pipeline, Admin, Alerts, and Help & support. The breadcrumb trail indicates the user is in 'My policies' > 'European Executive Investment Bond - PRIIPs (600040773)'. A 'Back' link is also present. The main section is titled 'European Executive Investment Bond - PRIIPs (600040773)' and features a 'Policy actions:' dropdown menu with options: Policy Valuations, Premiums, Withdrawals, Policy management (highlighted), and New Deal Instruction. Below the actions menu are two summary boxes: 'Value of portfolio fund:' showing GBP 348,675.44 as of 21-Aug-2022, and 'Total money in vs money out:' showing GBP 358,017.84 as of 22-Aug-2022. A 'View performance' link with a line graph icon is located between these boxes. On the right, a 'Policy Contacts (1)' box lists contact details for a Financial Adviser/Financial Adviser Representative.

utmost
WEALTH SOLUTIONS

You were last signed in on **11/08/2022** 537679USRNM [Sign off](#)

Member name or member reference or policy number [Search](#)

[Home](#) [My Policies](#) [Members](#) [Approvals](#) [Pipeline](#) [Admin](#) [Alerts](#) [Help & support](#)

You are here: [Home](#) > [My policies](#) > [European Executive Investment Bond - PRIIPs \(600040773\)](#) [Back](#)

European Executive Investment Bond - PRIIPs (600040773)

Policy actions: [+ Policy Valuations](#) [+ Premiums](#) [+ Withdrawals](#) [+ Policy management](#) [New Deal Instruction](#)

Value of portfolio fund:

GBP 348,675.44 [?](#)

Value as at **21-Aug-2022** [Get current value](#)

Total money in vs money out:

GBP 358,017.84 [?](#)


Value as at **22-Aug-2022**

[View performance](#)

Policy Contacts (1)

Name: **588112FRST_NM 588112LS T_NM**
 Role: **Financial Adviser/Financial Adviser Representative**
 Company: **559070FRSTNM**
 Telephone: **58811299991**
 Email: **abc@tcs.com**

Read through the estimated surrender value, as well as the important information on the right-hand side of the screen prior to pressing '**Proceed to full surrender**'.



537679USRNM ▼
You were last signed in on **11/08/2022**

Home

My Policies

Members

Approvals

Pipeline

Admin

Alerts

Help & support

You are here: [Home](#) > [My policies](#) > [Executive Redemption Bond\(600029297 \)](#) > [Estimated surrender value](#) Back

Estimated surrender value

Below is the current estimated surrender value for this policy.

Please note that it is **highly recommended** that you speak with your Financial Adviser/ Financial Adviser representative before deciding to surrender any policy.

| | |
|---|---|
| Estimated current value of Portfolio fund: | GBP 391,424.45 |
| Outstanding charges: | GBP 26,403.22 <input data-bbox="1039 725 1058 746" type="button" value="?"/> |
| Estimated surrender value: | GBP 365,021.23 <input data-bbox="1049 775 1068 796" type="button" value="?"/> |

Things you should know before you surrender your policy

- On full surrender the policy will end and no further benefits will be payable in respect of that policy.
- We will make payments to Policyholders only. For a Policy owned by two or more Policyholders we will normally pay into a bank account held jointly by all Policyholders. Please note that third party payments are not permitted.
- The value of outstanding charges are estimated and may not accurately reflect the amount of outstanding charges which apply to your policy.

- Confirm the bank account the surrender is to be paid to.
- If no accounts are listed, press '**Add a new bank account**' and enter required details before pressing '**Next**'.

1. Select bank account
2. Review summary

1. Select bank account

Tell us which bank account you would like your full surrender proceeds to be paid into.

| | |
|--|--|
| Estimated current value of portfolio fund: | GBP 391,424.45 |
| Outstanding Charges: | GBP 26,403.22 ? |
| Estimated surrender value: | GBP 365,021.23 ? |
| Currency: | GBP <input type="checkbox"/> |
| Bank account to be used: | 12345678 ? <input type="checkbox"/> Add a new bank account |

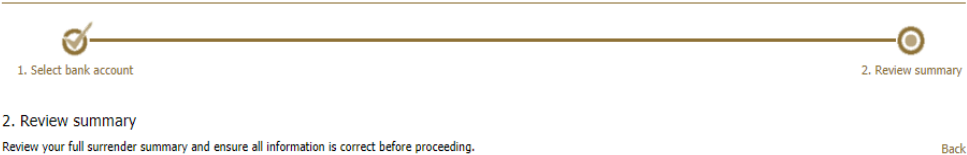
| | |
|--|---|
| *Account name: | 81679185020072021TRUSTDTL |
| UK sort code: | |
| SWIFT or BIC code: | RBOSGGSP |
| Bank name: | ROYAL BANK OF SCOTLAND INTERNATIONAL |
| Bank address: | LA TOUR GRAND HOUSE LOWER POLLET STREETST. PETER PORT |
| Bank country: | Guernsey C.I. |
| *Currency: | GBP |
| *Account number: | 12345678 |
| IBAN: | GB13RBOS16202956599530 |
| Payment reference (this will appear on your bank statement): | <div style="border: 1px solid #ccc; padding: 2px;">Notes</div> <div style="border: 1px solid #ccc; height: 20px; margin-top: 2px;"></div> <div style="border: 1px solid #ccc; height: 20px; margin-top: 2px;"></div> <div style="border: 1px solid #ccc; height: 20px; margin-top: 2px;"></div> |

Back
Next

Payment details checklist

- **IMPORTANT INFORMATION:** Payments to banks outside the UK require an International Bank Account Number (IBAN) and a SWIFT or Bank Identifier Code (BIC). SWIFT and BIC codes are available from the bank or from www.swiftcodes.org.
- The withdrawal must go to an account held in the name of the applicant(s)/policyholder(s).
- Payments to an account within the UK, Jersey, Guernsey, Isle of Man or Gibraltar require a bank account number and sort code.
- The withdrawal will be paid directly into the bank account number you give us here, so please enter the details carefully.
- 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.
- Please note that for clients holding accounts with Revolut Bank, routing details are required, and therefore payments must not be submitted online using Wealth Interactive.

Check the summary and when you are ready, press 'Submit'.



Full surrender summary

| | |
|------------------------------------|------------------|
| Estimated value of portfolio fund: | GBP 391,424.45 |
| Outstanding Charges: | GBP 26,403.22 ? |
| Estimated surrender value: | GBP 365,021.23 ? |

Asset information

Below you will find the value of each asset that is being sold to enable the full surrender of your policy.

| | |
|----------------------|--|
| Transaction accounts | Withdrawal amount: GBP -3.43 |
| Authorised custodian | Estimated surrender amount: GBP 391,427.90 |

Full surrender currency

Currency: GBP

Edit

Review summary

This page summarises your full surrender request. It shows:

- The assets being sold, the number of units and current estimated value of those units. This value is an indication of the amount you will receive when the policy is surrendered, as it will depend on the unit prices used when each of your assets are sold, less any outstanding charges that may apply.
- The bank account to which the full surrender payment will be made.

Table 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.

Banking details

Edit

| | |
|---------------------|--|
| *Account name: | 81679185020072021TRUSTDTL |
| UK sort code: | |
| SWIFT or BIC code: | RBOSGGSP |
| Bank name: | ROYAL BANK OF SCOTLAND INTERNATIONAL |
| Bank address: | LA TOUR GRAND HOUSE LOWER POLLET STREETST. PETER PORT |
| Bank country: | Guernsey C.I. |
| *Currency: | GBP |
| *Account number: | 12345678 |
| IBAN: | GB13RBOS16202956599530 |
| Remittance Details: | Notes |

Declaration

I,
1. authorise and request Utmost International Isle of Man Limited to carry out the transaction detailed in this request in accordance with my policy terms.
2. confirm that the amount to be received is the value of Allocated Units less any outstanding Charges including any Asset Dealing Charges/Investment Dealing Charges, Third Party Agent Charges and Other charges.
3. confirm that all the information contained in this form is true and correct and that I am entitled to the legal and/or beneficial interest in the policy unless the policy is subject to a trust or nomination and the beneficiaries are entitled to receive payment in accordance with the provisions.
4. confirm that there is no Bankruptcy Order against the policyholder or beneficiary (if applicable) nor are they an undischarged bankrupt or deemed to be insolvent under any relevant insolvency legislation.
5. undertake to indemnify Utmost International Isle of Man Limited against any claims or demands made by any other person or party as a result of the payment requested in this request.
6. agree that payment of the partial or total surrender proceeds shall constitute full discharge of the liability of Utmost International Isle of Man Limited.
7. confirm that I have sought financial advice in regards to the potential tax consequences of totally surrendering one or more of my policies and I have referred to the policy terms and literature in respect of total surrender.
8. understand that Utmost International Isle of Man Limited may terminate my Online Service agreement if all of my policies come to an end by totally surrendering all policies within my contract.

☒ I confirm that I have consulted my financial adviser before making a final decision to proceed with this request and I am happy to proceed.

☒

Back

Submit

- Confirmation of full surrender will be shown on screen.
- Once this has been submitted, this will be sent to the relevant Corporate Trust approvers before being placed by Utmost International.

Confirmation of your full surrender

You have successfully requested a full surrender of your policy.

Areas requiring your attention

Surrendering from an authorised custodian

Your surrender request has been submitted to your authorised custodian to arrange to sell the assets for this policy.

You will receive your full surrender payment once all of your assets have been sold. Depending on your request, the authorised custodian may send the payment directly to your bank account or the authorised custodian may send the payment to us first so that we can pay it to you.

What happens next?

Your full surrender is being processed

Your surrender request has been accepted. You can track its progress through the 'Transactions' option in the feed on your homepage or policy page.

You will receive your full surrender payment once all your assets have been sold, and corresponding contract notes have been verified.

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

IMPORTANT INFORMATION

www.utmostinternational.com

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

Utmost International Isle of Man Limited is registered in the Isle of Man under number 24916C. Registered Office: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles. Tel: +44 (0)1624 655 555 Fax: +44 (0)1624 611 715. Licensed by the Isle of Man Financial Services Authority.

Utmost Wealth Solutions is registered in the Isle of Man as a business name of Utmost International Isle of Man Limited.

Utmost PanEurope dac is regulated by the Central Bank of Ireland. Registered No 311420. Administration Centre for correspondence: King Edward Bay House, King Edward Road, Onchan, Isle of Man, IM99 1NU, British Isles. Tel: +353(0)1 479 3900 Fax: +353(0)1 475 1020.

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

Utmost Wealth Solutions is registered in Ireland as a business name of Utmost PanEurope dac.