

INCOME PAYMENT REQUEST

Please complete each section.

1. PLANHOLDER DETAILS

Plan Number(s): _____

First Planholder: _____

Address: _____

Second Planholder (if jointly owned): _____

Address (if different to First Planholder): _____

2. INCOME REQUIRED

Fixed Amount: _____ or % pa Value of Plan: _____

Payable: Annually ☐ Half-Yearly ☐ Quarterly ☐ Monthly ☐

First Payment on: (see notes below)

d	d	m	m	y	y	y	y
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3. PAYMENT DETAILS – Please complete as applicable

Payment to be made to the following bank account:

Bank Name: _____

Bank Address: _____

Account Holder Name: _____

Account No.: _____

☐ IBAN or ☐ CLABE: _____

☐ Sort Code, ☐ Swift Code, ☐ BIC or ☐ ABA: _____

Correspondent bank details (If known):

Bank Name: _____

Bank Address: _____

Account No.: _____

☐ IBAN or ☐ CLABE: _____

☐ Sort Code, ☐ Swift Code, ☐ BIC or ☐ ABA: _____

Please note further information in relation to the payment if required: _____

4. REQUIRED ADDITIONAL DOCUMENTATION

The below documents will be required in order to release your payments. Please indicate by ticking the boxes that the documents have been completed and sent to us for processing.

- ☐ This original 'Income Payment Request', signed by all planholders
- ☐ Original certified identification and proof of address documents for all planholders
- ☐ Up-to-date original 'International Tax Compliance Form'

5. AUTHORISATION

I/We wish to take an income as shown. I/We understand that payments will be made in accordance with plan conditions.

Signature of First Planholder:

Signature of Second Planholder (if any):

Date:

d	d	m	m	y	y	y	y
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Date:

d	d	m	m	y	y	y	y
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Minimum payment from each plan is £50. Payments will cease if the value remaining is less than £1,000.
Frequency of payment depends on the total value of the investments.

Total Value	Payment Frequency
Less than £5,000	Annually
£5,000 - £9,999	Half-Yearly
£10,000 - £19,999	Quarterly
£20,000 and over	Monthly

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Websites may refer to products that are not authorised or regulated and/or are not available for offering to planholders in certain jurisdictions.

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