

For customers

# Regular withdrawal form

You should use this form for regular withdrawals only. It can be used for an existing Investment Control bond where the secure income option hasn't been selected, an Investment Bond or a Performance Bond.

Please fill in this form using BLOCK CAPITALS and in ballpoint pen.

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CD version of this document please call 03456 10 00 10 (call charges will vary) or visit [aegon.co.uk/onlineform](http://aegon.co.uk/onlineform)

## 1. Bondholder details

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Full name(s) of bondholder(s)


Address

Postcode

Bond number

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Contact phone number

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Email

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We'll only use your phone number and email address to contact you about this instruction.

## 2. Regular withdrawals

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The taxation rules governing any withdrawals are important. Your financial adviser will give you more details.

2.1 Please complete **a**, **b**, **c** or **d** below to indicate how much you want to withdraw.

**Where you have an Investment Control bond and have selected our protected investment option, the maximum withdrawal allowed over all segments is 7.5% a year. If you want to withdraw more than 7.5%, you'll need to cash in full segments.**

**a**  % a year of the original total investment.

**b**  £ fixed amount for each regular withdrawal. The minimum regular withdrawal is £40 a month and £100 for other frequencies.

**c**  % a year of the value of the investment at withdrawal date. This option is only available on bonds starting on or after 15 January 2001.

**d** Distribution funds only

Full distribution amount

## 2. Regular withdrawals – continued

**2.2** Where you hold units in more than one fund, please complete the following (please tick one box only).

Make the regular withdrawals by:

- cancelling units proportionally across all funds
- cancelling units from one specific fund as set out below

Fund name

If you took out your bond before 15 January 2001 and it's invested in the Distribution fund, and you've chosen a percentage or fixed withdrawal at **a** or **b** above, then if the distribution amount is less than your chosen withdrawal do you require:

- the distribution amount only to be paid, or
- the shortfall to be paid by cashing in additional units proportionally across all funds.

Date of first withdrawal:

Date must be between 1-28 of the month.

D	D	M	M	Y	Y	Y	Y
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And after that every (please tick one box only):

- month  quarter  six months  year

The withdrawal date is the date on which we'll cancel your units. We'll make a payment into your account within five working days after that date.

Withdrawals can't start within four weeks of us receiving this instruction.

**2.3** Please give details of the bank account payments are to be made to.

Payments must be made to one of the bondholders.

If you want us to pay by cheque or to an account that we don't hold on record, we need a certified copy of a statement for that account and one of the following for each bondholder:

- Passport
- UK photo driving licence
- National identity card
- Firearms certificate/shotgun licence
- Identity card issued by the Electoral Office in Northern Ireland

You can find out who can certify a document and how they do it at [aegon.co.uk/certify](http://aegon.co.uk/certify)

Bank/Building society name

Address

Postcode

Sort code

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Account number

Name of account holder

Building society roll number/reference

### 3. Declaration

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I/We declare that I am/we are entitled to receive payment from the bond and that no other person has any rights to the bond or proceeds of it.

Date

D	D	M	M	2	0	Y	Y
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Signature(s) of bondholder(s)

X	X
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X	X
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X	X
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X	X
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