

CURTIS BANKS SELF-INVESTED PERSONAL PENSIONS WITHDRAWAL FORM

for existing clients

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio version of this document, please visit aegon.co.uk/support/additional-support or call 0345 604 4001 (call charges will vary).

This form is to be used to **set up regular withdrawals from your product cash facility.**

You can only have one regular withdrawal from your product cash facility at a time.



Please complete this form and return it to:

Curtis Banks, 153 Princes Street, Ipswich, IP1 1QJ

Section 1

Client details

Product number

8

Mr/Mrs/Miss/Ms/Other
- please specify

Full forename(s)

Surname

Curtis Banks plan number

When completing date fields please use the usual **DD/MM/YYYY** format.

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Section 2

Regular withdrawal plan

2A. Regular withdrawal plan

Use this section to set up a regular withdrawal plan from your product cash facility. Tick one of the boxes below to set up your regular withdrawal plan and preferred start date. Your instruction must be received at Aegon by the last business day of the month before your nominated start date. Payments will be deducted from your product cash facility six working days after the calculation date (the 12th of the month or next available working day) and will be made available in your nominated bank account within five working days.

Where you select quarterly payments, we will pay your income at the end of March, June, September and December.

☒ Monthly ☐ Quarterly ☒ Half-Yearly ☐ Annually

Amount £

Start date

/

2B. Options for making regular withdrawals

If on the calculation date, your product cash facility has less than the required regular withdrawal amount, Aegon will sell down funds (as per the cash top-up process) on the same day or next available working day. Where larger numbers of instructions are received, Aegon will sell down at the next available valuation point. You will not receive a confirmation notice for each sell down, it will appear on your statement.

If you wish to amend your cash top-up instruction, please complete Aegon's 'Change to product details' form. For more information, please refer to the Aegon Platform terms and conditions.

Section 3	Adviser details (for adviser use only)
Adviser name	<input type="text"/>
Firm name	<input type="text"/>

Section 4	Authorisation (adviser use only)
I have full authority from my client to instruct Aegon to carry out this transaction.	
Adviser Signature	<input type="text" value="X"/> Date <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Curtis Banks Signature	<input type="text" value="X"/> Date <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Office use only (Curtis Banks)
Curtis Banks confirms the adviser has the investor’s authority to sign this instruction on their behalf.

Aegon is a brand name of both Scottish Equitable plc (No. SC144517) registered in Scotland, registered office: Edinburgh Park, Edinburgh EH12 9SE, and Cofunds Limited, Registered in England and Wales No.3965289, registered office: Level 26, The Leadenhall Building, 122 Leadenhall Street, London, EC3V 4AB. Both are Aegon companies. Scottish Equitable plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Cofunds Limited is authorised and regulated by the Financial Conduct Authority (FCA). Their FCA Financial Services Register numbers are 165548 and 194734 respectively.