

Withdrawal instruction

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 call 03456 081 680 (call charges will vary) or visit aegon.co.uk/additionalsupport

You should complete this form to request a withdrawal from an Aegon product wrapper. Withdrawals from the Aegon SIPP must be made using the Benefit crystallisation event application. To make a withdrawal from more than one product wrapper, please complete a form for each.

If you're an individual customer you can complete this form electronically. Please type in the box(es), including your name in the signature box and email it to: clientsupport@arc.aegon.co.uk

Our email system and the way we deal with data internally is secure. However, we're unable to ensure the security of emails before they reach us so please consider this and do not include any personally sensitive, financial or banking information that has not been appropriately secured.

If your instruction relates to an Individual Savings Account (ISA), the ISA is a flexible ISA. This means when you make a withdrawal from your ISA you can replace it, in the same tax year, without it counting against your annual ISA allowance for the current tax year.

For more than one account holder you must complete this form in black ink and email to clientsupport@arc.aegon.co.uk or post to: Aegon Digital Solutions, Sunderland SR43 4DL.

Accounts set up under a trust agreement or by a corporate body, should complete the form in black ink and return by post to: Aegon Digital Solutions, Sunderland SR43 4DL.

1. Investor details

Please confirm the product type, for example General Investment Account (GIA) and number from which this withdrawal should be taken.

Product wrapper name

Investor name(s)

Product wrapper number

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2. Withdrawal instruction

I/We want to withdraw the following amount from the product detailed in section 1.

☐ All - your product will be closed.

☐ Partial withdrawal - your product will remain open and any Direct Debits will continue.

Withdrawal amount £

or

Percentage of product value %

Payments will typically take up to 14 working days to reach your nominated bank account.

Any sale or switch of funds could have Capital Gains Tax implications depending on your individual circumstances. Please contact a tax adviser for more information or visit gov.uk/capital-gains-tax.

3. Bank details

Your payment will be made to your nominated bank account as detailed below.

Name of bank/building society

Account name

Branch sort code

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Account number

If this is the first payment to your nominated bank account, a certified copy of your bank statement may be required. A certified copy of your driving licence may also be required as proof of signature.

Payments can only be made to accounts in your name.

4. Authorisation

- For an Individual Savings Account (ISA) or individual General Investment Account (GIA) – one signature is required.

You should sign and date this form by typing your full name in the signature boxes below and typing the date in the date boxes or by using any other electronic signature method we have agreed, in writing with your adviser, to accept. Your typed name or agreed electronic signature method in the signature boxes will be your signature. When you sign the form electronically, by typing your name in the boxes or using the agreed electronic signature method, you are making the declarations and confirming that you wish to proceed with the instructions in this form.

- For a joint General Investment Account, all registered holder(s) signature(s) are required.

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- For an account set up under a trust agreement or by a corporate body, all registered holder(s) signature(s) are required.

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Customer

Aegon ISA holders and Aegon GIA primary holder

Date

Print name

Signature (type name or sign here)

All joint Aegon GIAs holders must sign

Additional joint holder one

Date

Print name

Signature (sign name here)

Additional joint holder two

Date

Print name

Signature (sign name here)

Additional joint holder three

Date

Print name

Signature (sign name here)

