



For customers

How to set up regular withdrawals for GIA and ISA on the Aegon Platform



How to manage regular withdrawals

This guide explains how to manage regular withdrawals from a general investment account (GIA) or ISA on the Aegon Platform.

You need to set up a regular withdrawal six working days before the collection date you select. If there's less than five working days, your regular withdrawal will start from the following month.

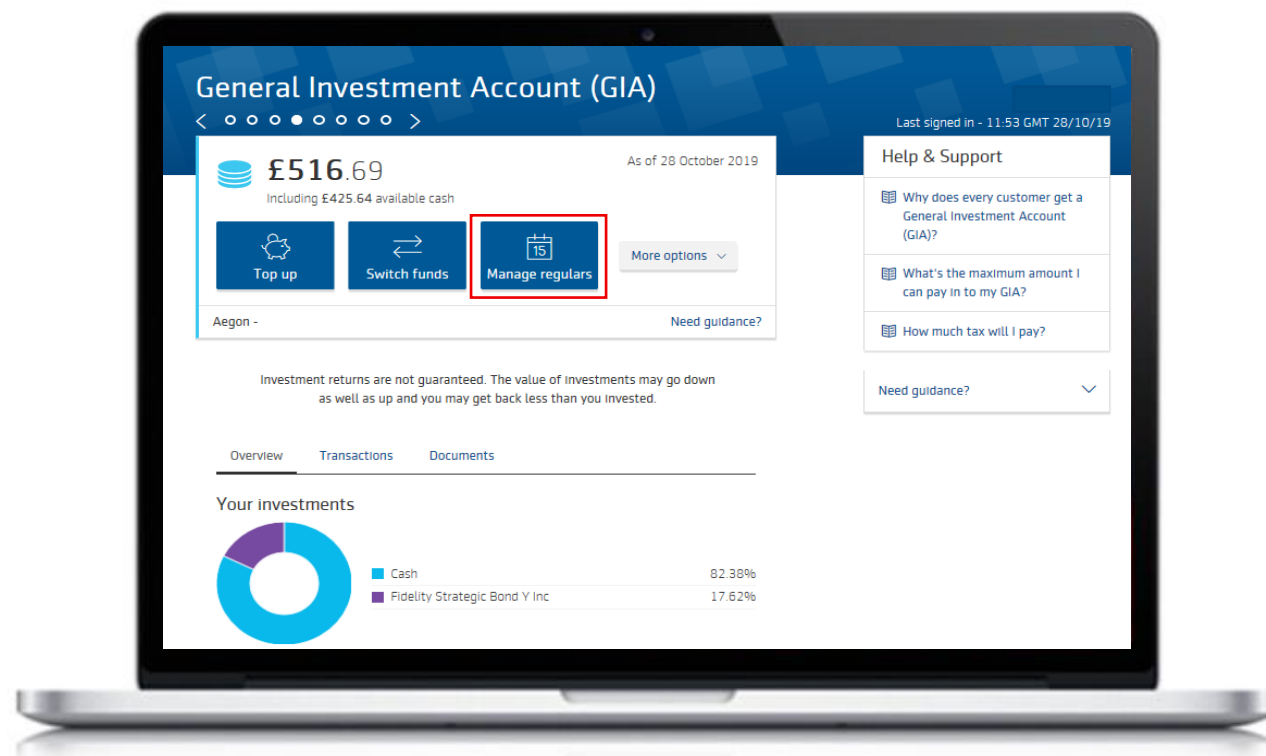
You can only complete this request online if you have transactional access.

If you have view only access to your account, you need to contact your financial adviser or intermediary.



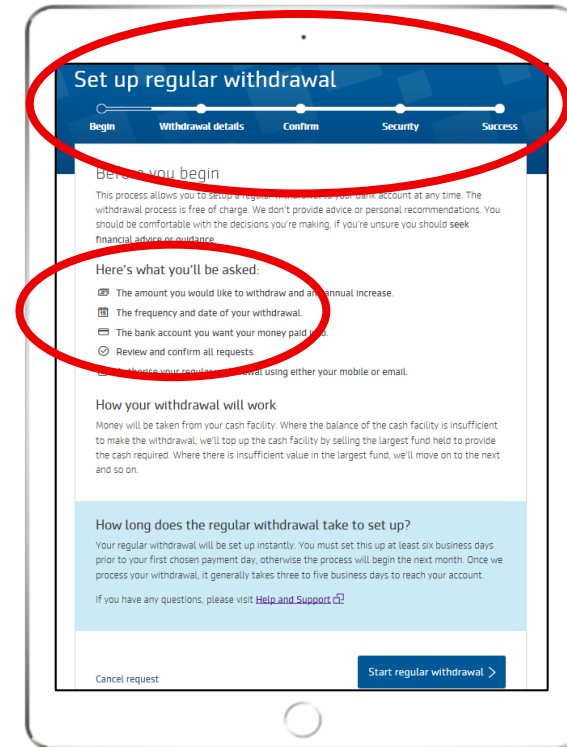
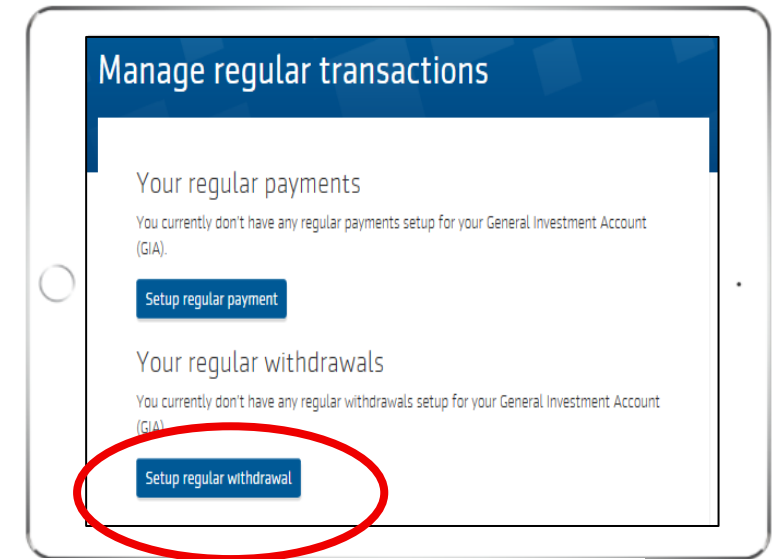
Manage regular withdrawals

1. Sign in to your Aegon Dashboard account.
2. Select the product you want to take the regular withdrawal from.
3. Then select **Manage regulars**.



Setting up your regular withdrawal

1. Select **Setup regular withdrawal**.
2. Along the top of the screen you can see what stage of the process you're at.
3. We also set out what you need to do in order to complete the process.
4. Select **Start regular withdrawal** to continue.

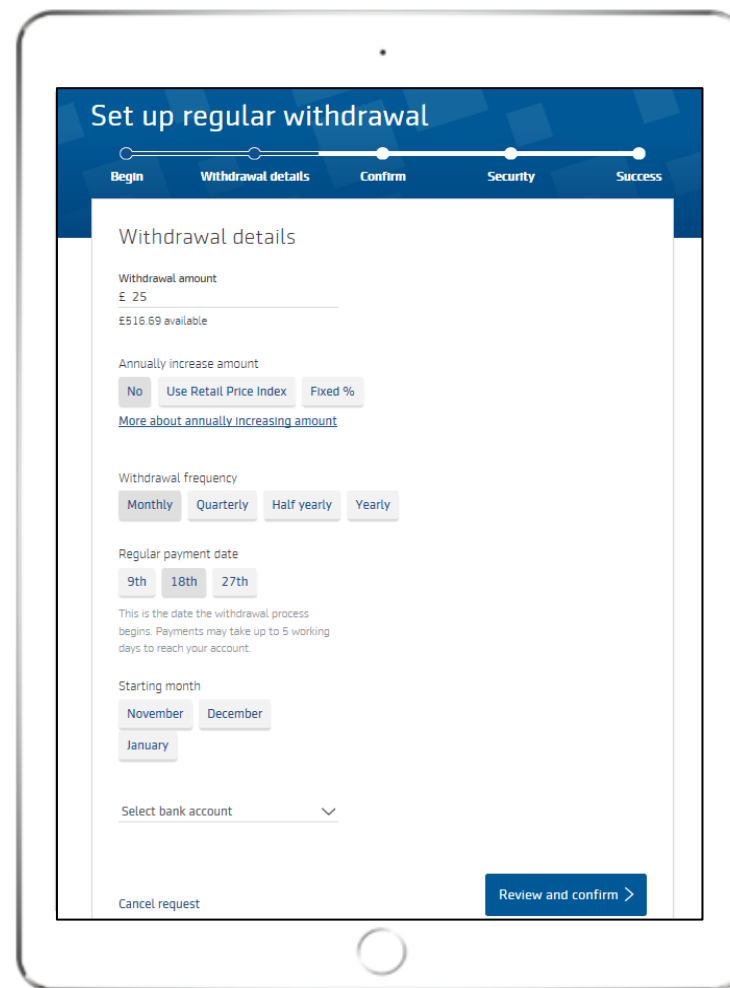


Setting up your regular withdrawal

1. Enter the amount you want to withdraw regularly.
2. Select annual increase amount.
 - None
 - Retail Price Index
 - Fixed %
3. Select regular payment date - 9th, 18th or 27th of the month.

This is when the payment leaves us by BACS. It will take three to five working days to reach your own account.

4. Select the start month from what we show.
5. **Select bank account** to tell us where you'd like us to make the payment to.
6. Select **Review and confirm** to continue.



The screenshot shows a mobile app interface for setting up a regular withdrawal. At the top, a blue header bar contains the title 'Set up regular withdrawal' and a progress bar with five steps: 'Begin', 'Withdrawal details', 'Confirm', 'Security', and 'Success'. The 'Withdrawal details' step is currently active. Below the header, the form is titled 'Withdrawal details' and includes the following sections:

- Withdrawal amount:** A text input field showing '£ 25'. Below it, it states '£516.69 available'.
- Annually increase amount:** Three buttons: 'No', 'Use Retail Price Index', and 'Fixed %'. A link below reads 'More about annually increasing amount'.
- Withdrawal frequency:** Four buttons: 'Monthly', 'Quarterly', 'Half yearly', and 'Yearly'.
- Regular payment date:** Three buttons: '9th', '18th', and '27th'. Below them is a note: 'This is the date the withdrawal process begins. Payments may take up to 5 working days to reach your account.'
- Starting month:** Three buttons: 'November', 'December', and 'January'.
- Select bank account:** A dropdown menu with a downward arrow.

At the bottom of the form, there is a 'Cancel request' link on the left and a blue 'Review and confirm >' button on the right.

Completing your regular withdrawal request

The **Review and confirm** screen shows the details of your regular withdrawal request.

Double check that you're happy with everything.

Confirm you give us permission to process your regular withdrawal request and then select **Confirm and withdraw** to complete your request.

Set up regular withdrawal

Begin Withdrawal details Confirm Security Success

Review and confirm

Please take time to check over your regular withdrawal amount, your bank details and fund details before confirming.

Your monthly withdrawal

Amount	Annual increase amount	Withdrawal frequency	First payment date
£25	No	Monthly	18/11/2019

Your bank details

Account number	Sort code	Building society roll number	Account name
****3102	**-**-77	**ST01	TEST01

Your regular withdrawal will be set up instantly. You must set this up at least six business days prior to your first chosen payment day, otherwise the process will begin the next month. Once we process your withdrawal, it generally takes three to five business days to reach your account.

[Edit withdrawal details](#)

How your withdrawal will work

Money will be taken from your cash facility. Where the balance of the cash facility is insufficient to make the withdrawal, we'll top up the cash facility by selling the largest fund held to provide the cash required. Where there is insufficient value in the largest fund, we'll move on to the next and so on.

Legal declaration

Please read before proceeding

It's important that you read the following important information and declarations before proceeding with managing regular withdrawals on your product.

Your decision to manage regular withdrawals on your product will be based solely on your interpretation of the information we've given and we haven't taken your individual needs and circumstances into account. If you're not sure if managing regular withdrawals on your product is right for you, you should get some financial advice (there might be a cost for this).

Before submitting this request to manage regular withdrawals on your product, you need to:

- read and accept these Declarations, and
- tick the checkbox at the bottom of the page and select the 'Confirm and withdraw' button to confirm acceptance.

General declaration

In this declaration:

'I', 'you', 'your' or 'my' refers to you, the investor

'Aegon' refers to Cofunds Limited.

'Manage regular withdrawals' means add, change or stop regular withdrawals on the product, and

'Product' refers to an Aegon ISA or Aegon General Investment Account (GIA), as applicable.

I declare that:

Where I was previously a Cofunds Advised or Self-directed customer or Investor Portfolio

☒ I instruct Aegon to manage regular withdrawals on my product in accordance with this request and the Aegon Platform terms and conditions.

[Cancel request](#) [Confirm and withdraw >](#)



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Aegon UK



Aegon UK

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