



For financial advisers only

# One-off withdrawal from an ISA or GIA on ARC



# One-off withdrawal

This guide explains how to request a one-off withdrawal from an ISA or general investment account (GIA) on Aegon Retirement Choices (ARC).

To request a one-off withdrawal, you need to complete a [Withdrawal instruction form](#). You can't do this online.

If there isn't enough money in cash to cover the one-off withdrawal, you'll need to complete a **Switch into Assets** request - you can do that online.

For further support when using ARC or One Retirement, [visit aegon.co.uk/support](https://www.aegon.co.uk/support)

The screens shown are for demonstration purposes only.



# Finding the withdrawal instruction form when logged in to ARC

If you're logged in to ARC you can select the **Literature (ARC)** tab to take you to the ARC document library.

The screenshot shows the AEGON ARC system interface. At the top, there is a navigation bar with tabs: Home, Client search, Documents, MI reports, and Literature (ARC). The Literature (ARC) tab is highlighted with a red box. Below the navigation bar is a blue header with the word "Home" and a search box labeled "Client search".

The main content area is divided into three sections:

- Transactions:** A sidebar menu with options: Pensions quote and apply, Investments quote and apply, Re-registration, Specialised quotes, Manage model portfolios, Investor model portfolio maintenance.
- Research and analysis:** A sidebar menu with options: Asset selector, CGT reporting tool, Fund charting, Portfolio scanner, Model portfolio evaluator, Retirement planner.
- Adviser charges summary:** A table with columns: Charge type, Amount.
- Total AEGON investments:** A table with rows: Value of holdings: £11.04, New business this month: £0.00, New clients this month: 0.
- Latest status updates:** A table with columns: Reference, Date, Description, Client name, Status, Source. It contains five rows of data for "Change of Details" for "Alison AEGON" with status "Completed" and source "Web".

At the bottom right, there is a button labeled "Show all status updates".

# Finding the withdrawal instruction form when logged in to ARC

Select **Client forms**, then select the **Withdrawal instruction** form.

A one-off withdrawal takes up to **11 working days**.

It can take up to seven days if we need to sell assets into cash, two days for us to process the payment and a further two days for your client's bank to accept the FastPay payment. These timescales are subject to change.

## Aegon Retirement Choices library

For intermediaries only

Handy guides - How to	+
Platform support films	+
Pre-sale client documents	+
<b>Client forms</b>	<b>-</b>
Ad-hoc income request (PDF 136Kb) 	
Death benefit nomination form (PDF 138Kb) 	
Change of investor details (PDF 86.3Kb) 	
Change to product details (PDF 84.7Kb) 	
The Pension Death Benefits Trust - English Law version (PDF 222Kb) 	
The Pension Death Benefits Trust - Scottish Law version (PDF 274Kb) 	
<b>Withdrawal instruction (PDF 95.9Kb) </b>	

# Complete the form

If you're requesting a partial withdrawal, there must be enough money in the cash facility to cover this. If there isn't you need to request a **Switch into assets** first - you can carry out that request online. [Log in](#) to your ARC account to complete this.

Please complete this form by typing in the boxes, including the signature box.

We'll try to verify the bank details and signature verification from documents/details we already hold on file. If we can't verify the bank details, we may ask you further documentation or confirmation.

For customers 

## Withdrawal instruction

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. Please complete this form by typing in the boxes, including the signature box and emailing it to [clientsupport@arc.aegon.co.uk](mailto: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. Please consider this when sending us sensitive information.

If you'd like a large print, Braille or audio CD version of this document, please contact us on 0345 680 1234 (call charges will vary) or at [aegon.co.uk/onlineform](http://aegon.co.uk/onlineform). We're always here to help so if you need some additional support from us please let us know.

- Investor details**

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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
- Withdrawal instruction**

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Amount of withdrawal  
£

or  
 %

The wrapper is to remain active (any Direct Debits, expectations, rebalancing etc will remain in place).

Payments will typically take up to 10 business days to reach your nominated bank account.

Partial withdrawals: 0.25% of your total investment must be held in the cash facility for each product wrapper. Before submitting a withdrawal instruction please make sure sufficient cash is available, including the 0.25% balance, or it will delay the payment process. See the terms and conditions for further information.

 Pensions | Investments | Protection

# Complete the form

Clients who are the only account holder can type their name in the signature box and email it to the mailbox shown on the form. However, if there's more than one account holder, they'll need to complete this form in black ink and post to:

Aegon Digital Solutions  
Sunderland  
SR43 4DL

Please don't email any personal, financial, or banking information as it's not a secure method of communication. If you have a dedicated secure email service with Aegon, for example Unipass Maillock, please use this service.

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

Note: 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 or individual General Investment Account – one signature is required.
- For a joint General Investment Account or if set up under trust agreement or by a corporate body – all registered holder(s) signature(s) 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, 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.

Date <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Print name <input type="text"/>	Print name <input type="text"/>
Signature (type name here) <input type="text"/>	Signature (type name here) <input type="text"/>
Date <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Print name <input type="text"/>	Print name <input type="text"/>
Signature (type name here) <input type="text"/>	Signature (type name here) <input type="text"/>

Form shown correct as at May 2022



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