

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

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 We're always here to help so if you need some additional support from us please let us know.

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

2. Withdrawal instruction

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.

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

 - -

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

Print name

Signature (type name here)

Date

Print name

Signature (type name here)

Date

Print name

Signature (type name here)

Date

Print name

Signature (type name here)



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