

Regular Withdrawal Request Form

Please complete this form using **BLOCK CAPITALS**. In addition, for bonds that commenced on or after 1 January 2001, please complete the form 'Declaration of Residence Outside Ireland'.

STEP 1 BOND DETAILS	
Contract Type (tick one box only)	
<input type="checkbox"/> Investment Bond	<input type="checkbox"/> Inheritance Plan
<input type="checkbox"/> Complete Investment Portfolio	<input type="checkbox"/> Universal Capital Account
<input type="checkbox"/> Guaranteed With Profit Bond	<input type="checkbox"/> Flexible Investment Plan
<input type="checkbox"/> Portfolio Bond	
PLAN NUMBER	<input type="text"/>

STEP 2 OWNERS OF THE BOND - PERSONAL INVESTORS ONLY			
Owner 1		Owner 2 (if any)	
Title (please tick)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other (in full)	Title (please tick)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other (in full)
Surname	<input type="text"/>	Surname	<input type="text"/>
Forename(s) (in full)	<input type="text"/>	Forename(s) (in full)	<input type="text"/>
Address (for correspondence)	<input type="text"/>	Address (for correspondence)	<input type="text"/>
	<input type="text"/>		<input type="text"/>
	Postcode		Postcode
Owner 3 (if any)		Owner 4 (if any)	
Title (please tick)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other (in full)	Title (please tick)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other (in full)
Surname	<input type="text"/>	Surname	<input type="text"/>
Forename(s) (in full)	<input type="text"/>	Forename(s) (in full)	<input type="text"/>
Address (for correspondence)	<input type="text"/>	Address (for correspondence)	<input type="text"/>
	<input type="text"/>		<input type="text"/>
	Postcode		Postcode
<p>If there is an additional owner of the bond, please copy Step 2, complete the corresponding details for the additional owner and attach the completed page to this Regular Withdrawal Request Form.</p>			



STEP 3**OWNERS OF THE BOND - TRUSTEE/CORPORATE INVESTORS ONLY**

Name of Trust/Corporate Body

Address (for correspondence)

Postcode

Please complete the details below for all of the Trustees/Authorised Signatories who are authorised to give instructions relating to the bond.

Name of Trustee/Authorised Signatory 1

Name of Trustee/Authorised Signatory 2 (if any)

Name of Trustee/Authorised Signatory 3 (if any)

Name of Trustee/Authorised Signatory 4 (if any)

If there is an additional trustee/authorised signatory of the bond, please copy Step 3, complete the corresponding details for the additional trustee/authorised signatory and attach the completed page to this Regular Withdrawal Request Form.

STEP 4**WITHDRAWAL DETAILS****A** Withdrawal Amount

*Delete as appropriate

(min amount £200/E300/US\$300)

(See note 1)

OR**B** Withdrawal % of Fund Value %

(See note 2)

Frequency of withdrawal payments (tick one box only):

(See note 3)

 Monthly Quarterly Half-Yearly Yearly

Start date of regular withdrawal payments

(See note 4)

(day/month/year)

Payment Details

The regular withdrawal payments can be made by cheque, telegraphic transfer to a Bank or direct credit to a **UK Sterling bank or building society account**. Payments made by telegraphic transfer will incur a bank charge. Payments can also be made by cheque to a private address.

Method of payment: (See note 5)

 Bank Cheque Private Cheque Telegraphic Transfer Direct Credit

If you have ticked **Bank Cheque, Telegraphic Transfer** or **Direct Credit**, please complete the following Bank Details.

Name of Bank/Building Society

Address

Postcode

Account Name

Account Number

SWIFT/Sort Code

Building Society Reference Number (if applicable)

STEP 4 (continued)**WITHDRAWAL DETAILS**

If you have ticked **Private Cheque**, please complete the following details.

Name of Payee

Address where payments have to be sent

Postcode

Note:

1. The maximum regular withdrawals you may take in any year will depend on the contract type.
2. Percentage withdrawal of fund value is not an option for the Guaranteed With Profit Bond or the Complete Investment Portfolio. We will not pay the regular withdrawal if the calculated figure falls below the minimum amount.
3. If you are invested wholly or partially in any of the Safety Plus Funds, regular withdrawals must be taken at the Quarterly Dealing Date i.e. quarterly, half-yearly or yearly.
4. If you have invested in any of the Safety Plus Funds, you only need to state the month and year of the 1st payment. Regular withdrawal payments from Safety Plus Funds are paid on the 4th Wednesdays of January, April, July and October.
5. The cost of telegraphic transfers will be deducted from the regular withdrawal payment before it is paid. So, for example, if you choose a regular withdrawal of £300 to be paid monthly, what will be paid is £300 less the cost of the transaction.
6. For the Complete Investment Portfolio, apart from the SMI Portfolio, all withdrawals are taken from the Cash Account. Withdrawals from SMI Portfolio will be taken on a pro rata basis from all the investments if more than one investment has been chosen. Any withdrawal from a With Profits Fund must not exceed the Annual MVR Free Allowance for that fund.
7. Depending on the contract type the value of the units cancelled will take account of any Terminal Bonus, Market Value Reduction, Allocation Charge or Surrender Charge that may apply.

STEP 5**DECLARATION**

I declare that I have the authority to give instructions in respect of the above numbered Plan. I instruct Scottish Mutual International to make regular withdrawal payments in accordance with the details above.

Signature of Owner/Trustee/Authorised Signatory 1

Date

Signature of Owner/Trustee/Authorised Signatory 2 (if any)

Date

Signature of Owner/Trustee/Authorised Signatory 3 (if any)

Date

Signature of Owner/Trustee/Authorised Signatory 4 (if any)

Date

If there are additional owners/trustees/authorised signatories of the bond, please copy this page, complete the corresponding details for each additional owner/trustee/authorised signatory and attach the completed page to this Regular Withdrawal Request Form.

Not for distribution in the USA or Canada

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