

TRUSTEE INVESTMENT PLAN

REGULAR WITHDRAWAL FORM

Phoenix Wealth, Unit Linked Life & Pensions, PO Box 1393, Peterborough, PE2 2TP.

What is this form for?

This Regular Withdrawal Form should be used by pension scheme Trustees who have invested in a Phoenix Wealth Trustee Investment Plan (TIP), and want to instruct Phoenix Wealth to begin a regular withdrawal or change an existing regular withdrawal instruction.

1. YOUR DETAILS

Existing Phoenix Wealth TIP policy number

Name of scheme	
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2. WITHDRAWAL INSTRUCTIONS

Please select **one** of the following two options:

- Begin a regular withdrawal strategy
- Change an existing regular withdrawal strategy

3. WITHDRAWAL AMOUNT

Please specify the amount required for each regular withdrawal:

Option 1: Fixed amount per withdrawal of: £

Option 2: % of the total investment value at the date of withdrawal, per withdrawal: %

4. WITHDRAWAL FREQUENCY

Please specify how frequently you wish to make withdrawals

- Monthly Quarterly Half-yearly Yearly

From which date would you like withdrawals to begin? / /

On this date we will cancel units necessary to pay your withdrawal instructions. We require 10 working days notice before the first payment date. If the withdrawal needs to be available in the clients SIPP/occupational pension scheme on a certain date, please take account of the fact that BACS payments may take up to 5 working days to be received in the account.

When would you like withdrawals to stop?

- To continue until further notice **OR** Last withdrawal on this date / /

For BACS, payment will be made to the pension bank account approximately four working days after this date. Telegraphic transfer payments will be made on the next working day after the requested income date. Cheque payments will be sent directly to the Scheme Administrator.

5. WITHDRAWAL OPTIONS

Withdrawals will be taken from all funds proportionally, unless you provide different instructions below.

Fund name	%
	TOTAL 100%

6. PAYMENT INSTRUCTIONS

Please select your method of payment:

Cheque
 BACS
 By telegraphic transfer – Please note there is a £25 charge for each payment

Please note that payments can only be paid into an account in the name of the Trustee.

6.1 For BACS/telegraphic transfer payments

Please provide your bank/building society account details:

Bank/building society name	
Bank/building society address (inc postcode)	
Account/roll number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Bank sort code	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/>
Name of account holder	

6.2 For cheque payments:

Please provide the payee details.

Payee name	
Address for correspondence (inc postcode)	

7. TRUSTEE DECLARATION

It is a serious offence to make false statements. The penalties are severe and could lead to prosecution.

- I/We, the Trustee(s) of the pension scheme or SIPP stated in this application (the "Scheme"), want to begin or change (as applicable) regular automated withdrawals from the Trustee Investment Plan detailed in this form, in accordance with my/our instructions above.

Data protection

Phoenix Life Limited, a member of the Phoenix Group, will hold and use the personal information you provide to set up and operate your Plan and for business analysis.

Your information may be sent for the above reasons to companies within the Phoenix Group in the UK and also to other companies acting on our instructions, including those outside of the European Economic Area.

By signing this form you consent to the use of this personal data for the reasons set out above. You also agree to Phoenix Life Limited passing this information onto: (1) your professional adviser(s) as you notify to us from time to time; and (2) such other third parties as may be necessary in connection with the provision and operation of your Plan, including our professional advisers.

We would like to use your contact details and share them with companies within the Phoenix Group (or other carefully selected companies) to enable us and them to send you information about other products and services. You may be contacted by post, telephone or email.

If you do not wish us to do this please tick the appropriate box below your signature. Otherwise we will assume that you are happy to receive this information and to be contacted in this way for the time being. You may change your mind at any time by writing to the Data Protection Officer, 1 Wythall Green Way, Wythall, Birmingham, B47 6WG.

Financial Crime (verifying your identity to prevent Fraud & Money Laundering)

To verify your identity and prevent financial crime we may use and share your information with any company within the Phoenix Group, with companies who work for us and with appropriate organisations.

We may also search, send your details to, and use information from third party verification service providers and financial crime and credit reference agencies (Third Parties). This involves checking your details against databases these Third Parties use. The Phoenix Group and these Third Parties may keep a record of the search, the results of the search, any suspicions of financial crime and the details may be used to assist other companies for verification and identification purposes. This search is not a credit check and your credit rating should be unaffected.

By signing this form you are giving your consent to these activities which will make it easier for you to do business with us and help prevent financial crime. For more information, please write to the Money Laundering Reporting Officer, 1 Wythall Green Way, Wythall, Birmingham, B47 6WG.

For self-invested personal pensions (SIPPs)

For and on behalf of the SIPP Trustee

Trustee/Authorised Signatory*	First Trustee	Second Trustee
Signature	×	×
Date	□□ / □□ / □□□□	□□ / □□ / □□□□

Please tick this box if you do not wish us to send you information about other products and services.

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For occupational pension schemes

Trustee/Authorised Signatory*	First Trustee	Second Trustee
Signature	×	×
Date	□□ / □□ / □□□□	□□ / □□ / □□□□

Please tick this box if you do not wish us to send you information about other products and services.

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*Please attach written evidence of the authority of the Trustee/Authorised Signatory.

Phoenix Life Limited, trading as Phoenix Wealth, is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Phoenix Life Limited is registered in England No. 1016269 and has its registered office at: 1 Wythall Green Way, Wythall, Birmingham, B47 6WG.

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