

If your instruction is being submitted online:  
**You do not need to send this form to us**

## Regular Withdrawal Request

ISA or Collective Investment Account (CIA)

It's often quicker and easier for your financial adviser to submit your instructions online

Many regular withdrawal requests can now be completed online by financial advisers.  
Follow the simple checks below to see how:



### 1. Confirm if your adviser can submit your request online

- Is the withdrawal request £75,000 or less?
- (CIA) Is the CIA in your sole name (not jointly held or in the name of a trust, company, club, charity or pension scheme)?
- Will the money be paid into a verified bank account?

If you answer YES to the questions above:

### 2. Your adviser can submit this online



**For advisers,**

log into your [Adviser Login Page](#)  
at [adviser.platform.quilter.com](https://adviser.platform.quilter.com)



- Select the account
- Click on 'Money out'
- Select 'regular withdrawal' and follow the on screen instructions
- For video guides go to: [quilter.com/help-and-support/video-hub](https://quilter.com/help-and-support/video-hub)

### 3. Complete & submit the online instruction instantly

If you answer NO to any question above:

### 2. Complete this form.

### 3. Send it to us via email or post

**Email:** send your scanned copy\* via PROMPT, our tool for uploading documents direct to us:

**For customers,**

**Visit:** [quilter.com/help-and-support/tools/promptcustomer/](https://quilter.com/help-and-support/tools/promptcustomer/)

**For advisers,**

**Visit:** [quilter.com/help-and-support/tools/new-prompt/](https://quilter.com/help-and-support/tools/new-prompt/)

Or customers can send via email to  
[ask@quilter.com](mailto:ask@quilter.com)

\*Before sending any supporting documents to us, please refer to our guide about which documents must be certified as true copies and who can certify them. The guide is available via the PROMPT link above.

**Post:** send the completed form to:  
Quilter, SUNDERLAND, SR43 4JP.



## Regular Withdrawal Request

*ISA or Collective Investment Account (CIA)*

*This form contains the information that you can use to:*

- set up a new regular withdrawal instruction
- amend an existing regular withdrawal instruction.

**This form cannot be used for:**

- amending withdrawals on a Discounted Gift Trust (DGT).

**We regularly update our documents;** your financial adviser can confirm that this **November 2023** version is the latest by checking on our website [quilter.com](https://www.quilter.com)

### *Completing this paper form (if your request cannot be submitted online)*

- You can complete the form electronically using the editable fields, if preferred; we recommend saving the form to your desktop before you do so, to ensure that your information is saved correctly. Then print, sign and send the completed form to us.
- Alternatively, you can print the form and complete it by hand, using BLOCK CAPITALS and blue or black ink. For dates, please use the format day/month/year.
- Complete the details in each applicable section carefully; we cannot be held responsible for any consequences if they are incorrect. Errors or omissions will not be corrected retrospectively.

### *Additional documents\* we might need*

- **Proof of the bank account ownership** – if not already verified, for the bank account into which your money is to be paid.
- **Trust documents** – for trust investments, if the trustees signing the request differ from those we have on our records.

\*You can scan and send certified documents to us by email - see page 1 for details.

### *Giving us your instructions*

- Details about how to give us your instructions online, by email or post are on page 1.

### *Timescales*

- Payments will be made direct to the bank using BACS (Bankers' Automated Clearing System) on the date you specify in your instruction.
- If we receive your instructions less than 10 days before the required payment date we cannot guarantee that they will take effect for that date.

### *Tax*

- We recommend speaking to your financial adviser before requesting regular withdrawals as there may be tax implications.
- Non-UK tax – if you are subject to tax in any country outside the UK, please contact your tax specialist, to understand whether you will be liable for tax in that country.

## 1. Your details

Full name of investor	<input type="text"/>	
Telephone number	<input type="text"/>	Email <input type="text"/>
Full name of joint investor ► <i>if applicable</i>	<input type="text"/>	

**Tick below to indicate whom we should contact if we have any queries about your instruction:**

My/Our financial adviser    OR    Me/Us using the details above

## 2. Your account number ► Please complete a separate form for each account

		Customer Reference	Account
ISA	CIA	A C <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"/>

### 3. Regular withdrawal details

- Note** – Any instructions you give in this section will apply to your entire account, and will override any existing instructions.
- Payments will be made into the bank account you nominate in section 3.3.
  - We will meet regular withdrawal payments in line with your instructions in section 3.4.

#### 3.1 Choose one of the following options

##### a) Regular Withdrawals of a specific amount of money

State how much you want to receive **each payment** £  (minimum £25)

Increase annually by:      Nil - no increase required      The Retail Prices Index % increase      5%

▶ If left blank we will assume 'nil'

OR

##### b) Regular Withdrawals of a percentage of your account value

State how much you want to receive **each year**  %\* per year

\* This is an annual percentage; when the payment is due, we will calculate the percentage based on the value of your account at that time. We will then divide that amount by the number of payments you specify in section 3.3, to calculate the amount to be paid at that time, which must equate to at least £25.

#### 3.2 Frequency

Monthly      Yearly      Specific month(s) – tick below as required

Jan	Feb	Mar
Apr	May	Jun
Jul	Aug	Sep
Oct	Nov	Dec

First payment date         ▶ Any day from 01 – 28, at least 10 working days after the date we receive this instruction but not more than six months in the future. If left blank we will use the earliest possible payment date.

#### 3.3 Bank details for your payments

- Note** – This must be a UK bank in your name or with you as a joint holder; we CANNOT make withdrawal payments to third parties.
- Some banks or building societies cannot accept direct credits.
  - If you change your bank details, or if you want to request payment to a different account in the future, just let us know. We can hold details for up to four bank accounts under your customer reference number.

Branch sort code   -   -   Bank/Building Society account number

Bank/Building Society name

Name of account holder(s)

Reference (optional)

▶ Any reference here will appear on your bank statements. For a Building Society account, enter the roll number.

Bank account type      Individual      Joint      Trust      Other

**We need to see proof that this is the bank account of the payee, if we have not already seen it.\***

**Tick as applicable**      I have previously provided proof of ownership of the bank account detailed above  
I enclose proof of ownership of this bank account

\*The proof can be an original or certified copy of a voided cheque or bank account statement dated within the last six months. If you have online bank account statements, a printed copy certified as a true copy will suffice. Copies must be certified on each page in ink by a UK-based professional such as your financial adviser, solicitor, accountant, GP or bank manager (including the bank's stamp). You can scan and send certified documents to us by email - see page 1 for details.

### 3.4 – Assets to be sold

Please indicate the assets to be sold to meet your regular withdrawal payments: ► If left blank, a) will apply.

a) Sell proportionally from all assets (including cash held within your ISA/CIA)

b) Sell from the following assets\*

	%
<b>Total</b>	100 %

*\*If you select a portfolio, we will take the amount requested for the portfolio across all of the assets within it. If there is insufficient value in the assets you select, the withdrawal will be met by selling proportionally across all assets.*

**Note** If the assets to be sold include Exchange Traded Instruments (ETIs):

- they can only be sold in whole shares. Therefore, if the sale proceeds then exceed the regular withdrawal amount, the excess will be held as cash within your ISA/CIA
- a Dealing Charge will be incurred for each ETI sold.

## 4. Declaration and authority

**This declaration is made by each account holder or authorised signatory**

- a) I authorise and request Quilter to carry out the instructions detailed in this form.
- b) I understand that these changes will take effect in accordance with the account Terms and Conditions.
- c) I confirm that I am entitled to give instructions on the account stated in section 2.
- d) I declare that this form has been completed correctly to the best of my knowledge and belief.
- e) I understand that there may be tax implications if I make withdrawals from my account.

**Where there is more than one account holder, or more than one person is required to authorise changes, each one must sign, even if a Lead Account Holder has been appointed.**

<b>1. Signature</b>	<input style="width: 95%;" type="text"/>	Date	<input style="width: 95%;" type="text"/>
Print full name	<input style="width: 95%;" type="text"/>	Capacity*	<input style="width: 95%;" type="text"/>
<b>2. Signature</b>	<input style="width: 95%;" type="text"/>	Date	<input style="width: 95%;" type="text"/>
Print full name	<input style="width: 95%;" type="text"/>	Capacity*	<input style="width: 95%;" type="text"/>
<b>3. Signature</b>	<input style="width: 95%;" type="text"/>	Date	<input style="width: 95%;" type="text"/>
Print full name	<input style="width: 95%;" type="text"/>	Capacity*	<input style="width: 95%;" type="text"/>
<b>4. Signature</b>	<input style="width: 95%;" type="text"/>	Date	<input style="width: 95%;" type="text"/>
Print full name	<input style="width: 95%;" type="text"/>	Capacity*	<input style="width: 95%;" type="text"/>

\*eg investor, trustee, signatory

► If there are more than four signatories, continue on a separate sheet and attach it to this form.



[quilter.com](http://quilter.com)

Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.

Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

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