



Stocks and Shares ISA

Withdrawal form

Please complete this form if you want to take withdrawals from your Stocks and Shares ISA.

Withdrawals must be paid to a UK bank account, and you must be a named account holder to receive payments.

If you're withdrawing money to pay for something unexpected then please be aware of scams. If you're unsure, then get help or advice before making any payments.

1 Important information

Please read this section carefully before completing this application form.

- Please use BLOCK CAPITALS and black ink if completing a printed version of this form.
- If your financial adviser is completing this form on your behalf, please make sure you answer each question fully and accurately with them. You should remember that your adviser is acting on your behalf - not only by providing you with advice, but also regarding the completion of this form. If you need any further help completing this form you can call us on **0345 605 0050** 8am-6pm, Monday to Friday (excluding bank holidays).
- If any of your personal circumstances change after you've completed this form, you must tell us.
- It's also important that you provide up to date contact details when completing this form.
- If you have a financial adviser, they should keep a copy of your signed application form and any additional forms sent to us.
- Please return your completed form to us at: **Royal London House, Alderley Park, Congleton Road, Nether Alderley, Macclesfield, SK10 4EL**. If you're returning your form in an A4 window envelope, then you should read the additional instructions on the back page of this form.

2 About you

This section should be completed by all applicants.

Name											
Date of birth	<table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y		
D	D	M	M	Y	Y	Y	Y				
Address	 										
Plan start date	<table><tr><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	M	M	Y	Y	Y	Y				
M	M	Y	Y	Y	Y						
Plan number	<table><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										

2 About you continued

If there's been a change to any of your personal details, for example your permanent address, phone number or email address and you've not previously told us, please complete the table below and we'll update your details.

Type of change	Details

3 Your withdrawal

Please complete the relevant parts of this section.

Has this withdrawal been recommended by a financial adviser?

Yes

☐

No

☐

What type of withdrawal would you like to take?

One-off

☐

Regular

☐

Both

☐

If you take a withdrawal, it'll be taken proportionately across all the funds you hold.

One-off withdrawal

Please tell us how much you'd like to withdraw.

All ISA savings

☐

or

£

If you're withdrawing all of your ISA savings, would you like to keep your ISA open?

If you select No we'll close your ISA within five working days.

Yes

☐

No

☐

Regular withdrawals

How much would you like to withdraw each year?

£

If you're changing an existing regular withdrawal, this should be the new amount you wish to withdraw. This will replace your existing instruction.

What date would you like your regular withdrawals to start?

(You can choose between the 1st and 28th of the month)

If you're changing an existing regular withdrawal that's due to be paid within three working days of us receiving this form, your new withdrawal payment may not start until the next payment date.

How frequently would you like your regular withdrawals to be paid? (Choose one only)

Monthly

☐

Yearly

☐

Would you like your regular withdrawals to increase each year?

No

☐

In line with Retail Prices Index

☐

By a fixed percentage of

%

(max. 10%)

Where would you like your withdrawals to be made to? (Choose one only)

Withdrawals must be paid to a UK bank account, and you must be a named account holder to receive payments.

To the bank account my existing regular withdrawals are paid to

☐

or

To the bank account my existing regular contributions are paid from

☐

To a new bank account

You must be a named account holder

☐

Account holder's name

As it appears on the account

Sort code

Account number

4 How we'll use your personal information

We'll use the information you've provided in this form to help you access the money in your Stocks and Shares ISA.

We'll also share your information with selected third party companies such as service providers, regulators and research companies. Your information may be used to allow us to complete regulatory checks and to help us provide a better service for our customers.

If you'd like to know more about how we use your information, including your rights, our lawful basis, who else we may share it with and how long we keep it for, please take a look at our full privacy notice at royallondon.com/privacynotice.

If you'd rather receive this information in another format, for example a recorded version, please call us on **0800 085 8352**.

5 Declaration

Please confirm you've carefully read the application declaration. If there's anything you don't fully understand please contact Royal London.

I confirm that this is my application to start or change regular withdrawal payments and/or to take a one-off withdrawal from my Stocks and Shares ISA.

I confirm that:

- all withdrawals will be carried out as detailed in the terms and conditions of the Stocks and Shares ISA Plan Booklet;
- if I withdraw money from my Stocks and Shares ISA, I might not be able to pay it back in within the same tax year if doing so would take me over the ISA allowance for that tax year; and
- if I withdraw all of my ISA savings and don't close my plan, Royal London will keep my ISA open for up to two years while not receiving any contributions or transfers. If I want to make a new contribution to my ISA, I may need to make a new declaration.

I confirm that the information and every answer I've provided in this application form is correct and complete to the best of my knowledge and belief, including any answers not filled in by me.

I also confirm that I've carefully read and accept the declaration.

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Returning this form

Royal London
Royal London House
Alderley Park
Congleton Road
Nether Alderley
Macclesfield
SK10 4EL

Returning this form: If you're using an A4 window envelope to return your completed application form please insert the completed form into the envelope, ensuring the address to the left is clearly visible in the envelope window.



Royal London
royallondon.com

We're happy to provide your documents in a different format, such as braille, large print or audio, just ask us when you get in touch.

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