WITHDRAWAL FORM FOR FLEXIBONDS, CAPITAL INVESTMENT BONDS, CAPITAL ACCESS BONDS AND SHREWD SAVINGS PLAN ISA'S

SECTION 1
WITHDRAWAL DETAILS

Please complete both pages of this form using **BLACK INK & BLOCK CAPITALS** and return to us.

We may need to come back to you for further information to ensure we meet current anti-money laundering rules.

The minimum withdrawal is £100. For details of the minimum amount that you must leave invested, please refer to your policy documentation.

We aim to process your request within a week of receiving it.

If you are unsure about anything, please ring us on **0800 622323**.

SECTION 2
YOUR BANK ACCOUNT DETAILS

Please send us proof of ownership for the account. It is not needed if:

- you have already provided proof in connection with another policy, or
- you are currently making direct debit payments into this policy and payment is to be made into that account, or
- payment is to be made to a solicitor or regulated financial services institution.

The proof can be in the form of:

- **a copy of a bank statement, or**
- **a cancelled cheque, or**
- **a paying in slip**

If you are providing a copy of a bank statement you can blank out the transaction details if you wish. We just need to see the top part of the document showing your name, address, name the account is held in, account number and sort code.

Full name(s) of policy owner(s):

Policy number(s):

Please tick (✓) one box to let us know how much you want to withdraw:

☐ I/we want to close my/our investment and withdraw all my/our money.

☐ I/we want to withdraw £ _____ from my/our investment. This must be a monetary amount. Please confirm the amount in words below.

Withdrawal amount in words:

Reason for withdrawal:

Have you discussed this withdrawal with an NFU Mutual Adviser?

☐ Yes ☐ No

If yes, please enter their name:

Please tick (✓) one box and enter your bank details below:

☐ Please pay direct into my/our bank account – once processed, the payment takes three working days to reach your account.

☐ Please pay by telegraphic transfer to my/our bank/building society account. I/we understand there may be a £10 charge for this service, which is deducted from the value of the policy.

Name and address of bank/building society

Postcode

Name(s) of account holder(s)

Bank or Building Society account number

Branch Sort Code – –

Where your account number is not eight digits long, please ring us to check that payments can be made into it.

Reference/building society roll number (if applicable)

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SECTION 3
DECLARATION

Please return both pages to us.

- I am/we are the legal owner(s) and want to withdraw this amount from my/our policy.
- A market value reduction might apply to a withdrawal from the With-Profits fund. This is most likely to happen following a large fall in the stock market or after a sustained period of low investment returns. NFU Mutual will contact you before processing this request if this is the case.
- If this is not a withdrawal from an ISA, I/we understand that this withdrawal might give rise to a tax liability.

By signing this form you are agreeing that:

- I/we are not aware of anyone else having a financial interest in this investment.
- I/we are entitled to claim the proceeds and understand that in the event of a future valid claim by a third party, NFU Mutual will seek to recover this money from me/us.

All owners of this policy must sign this form. If your policy is held in Trust, all policy owners and trustees must sign this form.

Full Name

Email

Signature

Date D D M M Y Y

Full Name

Email

Signature

Date D D M M Y Y

Full Name

Email

Signature

Date D D M M Y Y

Full Name

Email

Signature

Date D D M M Y Y

Your telephone number in case we need to contact you

Completed forms should be sent to:

Financial Services
NFU Mutual
Tiddington Road
Stratford-upon-Avon
Warwickshire
CV37 7BJ

NFU Mutual

The National Farmers Union Mutual Insurance Society Limited (No 111982).
Registered in England. Registered office: Tiddington Road, Stratford upon Avon, Warwickshire CV37 7BJ.
Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

To find out more about how we use your personal information and your rights, please view the privacy policy on our website.

WITH-GEN-0626

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