

**SUFFOLK LIFE SELF-INVESTED
PERSONAL PENSIONS
WITHDRAWAL FORM**

for existing clients

This form is to be used to **set up regular withdrawals from your product cash facility.**

You can only have one regular withdrawal from your product cash facility at a time.



Please complete this form and return it to:
Suffolk Life, 153 Princes Street, Ipswich, IP1 1QJ

Section 1

Client details

Product number

Mr/Mrs/Miss/Ms/Other - please specify

Full forename(s)

Surname

Suffolk Life plan number

When completing date fields please use the usual **DD/MM/YYYY** format.



Section 2

Regular withdrawal plan

2A. Regular withdrawal plan

Use this section to set up a regular withdrawal plan from your product cash facility. Tick one of the boxes below to set up your regular withdrawal plan and preferred start date. Your instruction must be received at Aegon by the last business day of the month before your nominated start date. Payments will be deducted from your product cash facility six working days after the calculation date (the 12th of the month or next available working day) and will be made available in your nominated bank account within five working days.

Monthly Quarterly Half-Yearly Annually Amount

Start date /

2B. Options for making regular withdrawals

If on the calculation date, your product cash facility has less than the required regular withdrawal amount, Aegon will sell down funds (as per your instruction) on the same day or next available working day. Where larger numbers of instructions are received, Aegon will sell down at the next available valuation point. You will not receive a confirmation notice for each sell down, it will appear on your statement.

Please select from one of the following two options. For more information, please refer to the Aegon Platform terms and conditions and the supplement for self invested personal pensions provided by Suffolk Life or speak to your adviser/ intermediary.

Option 1 – Largest value investment available
For Option 1, you can choose to sell the largest value investment available across all platform funds held within your Suffolk Life Self-Invested Pension.

Option 2 - Nominate an existing fund to sell from
For Option 2, you can nominate a fund from which units are to be sold. In the event of a fund being fully eroded your adviser/intermediary will be contacted, who will contact you for further instructions.

Full fund manager name, fund name and share class (example) World Equity Z Fund	Sedol code
<input type="text"/>	<input type="text"/>

Section 3 **Adviser/Intermediary details** (for adviser/intermediary use only)

Adviser/intermediary name

Firm name

Section 4 **Authorisation** (adviser/intermediary use only)

I have full authority from my client to instruct Aegon to carry out this transaction.

Adviser/ Intermediary Signature Date / /

Suffolk Life Signature Date / /

Office use only (Suffolk Life)

Suffolk Life confirms the adviser/intermediary has the investor's authority to sign this instruction on their behalf.

Aegon is a brand name of both Scottish Equitable plc (No. SC144517) registered in Scotland, registered office: Edinburgh Park, Edinburgh EH12 9SE, and Cofunds Limited, Registered in England and Wales No.3965289, registered office: Level 43, The Leadenhall Building, 122 Leadenhall Street, London, EC3V 4AB. Both are Aegon companies. Scottish Equitable plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Cofunds Limited is authorised and regulated by the Financial Conduct Authority (FCA). Their FCA Financial Services Register numbers are 165548 and 194734 respectively.