wealthtime classic

Regular withdrawals request form for trusts

Complete this form to make regular withdrawals from the Wealthtime Select General Investment Account (GIA). We can only accept an instruction to pay a fixed monetary amount.

1. Trust details

Title of trust

Client number

2. Beneficiary details

Mr ☐ Mrs ☐ Miss ☐ Other ☐

If 'other' please state

First name(s)

Last name

Date of birth (dd/mm/yyyy)

3. Bank details for regular withdrawals

Please provide details of the bank or building society account where the GIA regular withdrawal payments should be paid. Please check with the bank or building society that BACS payments can be accepted into this account and that the details below are all they need for this.

Account name

Sort code:

Account number

Building society reference number (if applicable)

Bank name and address

Postcode

4. Withdrawal payment details

Amount of regular withdrawal

We wish to deduct the regular withdrawal payments (please check one box)

Quarterly	☐ In advance	☐ In arrears
Half yearly	☐ In advance	☐ In arrears
Yearly	☐ In advance	☐ In arrears

Regular withdrawal payments are always made on the first business day of the month.

Start date for regular withdrawals (dd/mm/yyyy)

0 1

5. Disinvestment instructions

Disinvestments from the Wealthtime Classic Funds List must be placed by your Adviser using the Wealthtime Classic Investment Platform. If there aren't enough funds in your designated GIA bank account, it may mean that your regular withdrawal payment cannot be paid on time.

6. Declaration (Important - please read)

- We understand that regular withdrawal payments are always made on the first business day of the month.
- We understand that if we wish to start taking regular withdrawals, we must notify Wealthtime Classic at least 10 working days before the end of the month, prior to the date the first regular withdrawal payment is to be made.
- We understand that we can vary the frequency and amount of regular withdrawals paid, but we must notify Wealthtime Classic at least five working days before the end of the month, prior to the date the change is to come into effect (the date the change is to come into effect is always the first of the month).
- We understand that we can stop regular withdrawal payments at any time by providing Wealthtime Classic with written instructions at least 10 working days before the end of the month the end of the month, prior to the date the change is to come into effect.

Authorised signatory

Print name of signatory

Date

Authorised signatory

Print name of signatory

Date (dd/mm/yyyy)

If you require this document in an alternative format please contact us.