wealthtime

Regular Withdrawal Instruction

We've rebranded from Novia to Wealthtime. You'll notice that some of our products and services have kept the Novia name. So don't worry if you see both Wealthtime and Novia names in our documents. Wealthtime is a trading name of Novia Financial plc.

This form can be used to instruct regular withdrawals from your Novia GIA or Novia ISA. Withdrawals from the Novia SIPP must be made using the **pension withdrawal form:** https://www.wealthtime.com/advisers/adviser-hub/document-library/docs/pension-withdrawal-form. For changes to an existing Novia SIPP income instruction, please use the **pension withdrawal form:** https://www.wealthtime.com/advisers/adviser-hub/document-library/docs/pension-withdrawal-form. Withdrawals from the Novia Offshore Bond can be requested via the **Novia Offshore Bond withdrawal instruction and surrender request:** https://www.wealthtime.com/advisers/adviser-hub/document-library/docs/withdrawal-instruction-offshore-bond/

Please note that your adviser can submit regular withdrawals online using the Wealthtime platform and this form should only be used to set up a regular withdrawal that exceeds 10% of the Product Wrapper value (annualised).

Where payment is being made to a verified bank account, this instruction can be sent to us by your adviser without your signature for both Novia GIA and Novia ISA Product Wrappers.

If there is no verified bank account set up on your account, you'll need to ask your adviser to submit your bank details electronically using the Wealthtime platform. Alternatively, you may post a bank details form to us, and payment will be made once verification is complete.

If you want to authorise the instruction with your signature, please arrange with your adviser to return the original form to us.

Product Details

Investor number:

Product wrapper type: **Wrapper number:**

Investor name(s):

Bank Details

This instruction can only be paid to a verified bank account. Please confirm the details of the bank account where you would like to receive payment.

Branch sort code (last two digits only):

Account number (last four digits only):

Building society client number (last four digits only):

Payment to building society accounts may take up to 10 business days longer than payments to a bank account.

Payment Amount and Frequency

Please note that you cannot take regular withdrawals from where you are making regular investments.

Amount: £ ______ or ______ % calculated as a monetary amount at the time of processing this application.

☐ Monthly ☐ Quarterly ☐ Annually Start date (mm/yyyy):* ☐☐☐☐☐☐

*Please note that the start month cannot be more than 12 months from the date of application.

Do you wish to increase your regular withdrawals? (Please select one option only)

☐ No increase

☐ Increase by the Retail Prices Index (RPI)

☐ Increase by a fixed ______ % (1%-5% pa)

Payments will be made by us on the 9th business day of each month and will typically reach your account three business days later for bank accounts and up to 10 days later for building society accounts.

Adviser Declaration

This section must be completed regardless of submission method

We will accept this form without an investor signature, if it's submitted through the Adviser Zone secure email service. Alternatively, you can ask the investor to sign the completed form and arrange for the original to be returned to us.

By submitting this form, you are confirming the following:

- I declare that the information in this form is true and correct to the best of my knowledge.
- I agree to indemnify Wealthtime against all such claims or losses, including additional tax charges and fines, in the event that the information provided proves to be incorrect.
- I understand that checks may be performed on this instruction to confirm that the details are correct.
- I confirm that I have the Investor's authority to submit this instruction on their behalf.

Name:	
Position:	
Firm name:	
Firm FCA number:	

Investor Declaration

- I/We declare that the information in this form is true and correct to the best of my/our knowledge.
- I/We understand that checks may be performed on this instruction to confirm that the details are correct.
- I/We understand that any delay on my/our part to act on any further verification request will delay processing the instruction and my/our failure to act will prevent processing the instruction.
- I/We authorise you to make payments according to my/our instructions.
- I/We understand that on receipt of this instruction, you will update my/our records within five business days.
- I/We also understand that this will replace any existing regular withdrawal instruction I/we currently have in place.

Investor one name:

Investor one signature:

Date (dd/mm/yyyy):

Investor two name:

Investor two signature:

Date (dd/mm/yyyy):

Where the investor has signed the adviser must also sign and post the original to us.

Adviser signature:

Date (dd/mm/yyyy):

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