

# Suffolk Life Self-Invested Pensions Regular Withdrawal Instruction



This form can be used for setting up regular withdrawals from your Cofunds Trading Account. You can only have one regular withdrawal from your Cofunds Trading Account at any given time.

Please complete this Application Form using black ink in BLOCK CAPITALS and return to: **Suffolk Life, 153 Princes Street, Ipswich IP1 1QJ**

## 1 Intermediary Details (For Intermediary use only)

You will require a Cofunds authorisation code before being able to transact business. If you do not include this we will not be able to process this application.

Cofunds Intermediary Authorisation Code

Marketing Code

## 2 Investor Details

Please complete this section in full.

Existing Cofunds Client Reference

Suffolk Life Plan Number

Mr/Mrs/Ms/Miss/Other

Surname

Full First Name(s)

## 3 Regular Withdrawal Details

### 3A. REGULAR WITHDRAWAL PLAN

Use this section to set up a regular withdrawal plan from your Cofunds Trading Account. On the calculation date (12th of the month or next available working day), monies must be available in your Cofunds Trading Account for your regular withdrawal. If monies are not available, Cofunds will effect a sale of units from your investments. Please refer to the Cofunds Customer Agreement for more information.

Tick one of the boxes below to set up your regular withdrawal plan and preferred start date. Your instruction must be received at Cofunds by the last business day of the month before your nominated start date. Payments will be deducted from your Cofunds Trading Account 6 working days after the calculation date, and will be made available in your nominated bank account within 5 working days.

Monthly    
  Quarterly    
  Half-Yearly    
  Annually

Amount  £  .

Start date  /

M M / Y Y Y Y

### 3B. SELL DOWN OPTIONS

If on the calculation date, (12th of the month or next available working day) your Cofunds Trading Account has less than the required regular withdrawal amount, Cofunds will effect a sale of units (as per your instruction) on the same day or next available working day. Where larger numbers of instructions are received, Cofunds will effect a sale at the next available valuation point. Please note, 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 Cofunds Customer Agreement or speak to your intermediary.

**Option 1 – Proportional Sale of Units**

For option 1, you can choose a sale of units proportionately across all Platform Funds held within your Suffolk Life Self-Invested Pension.

**Option 2 – Specific Sale of Units**

For option 2, you can nominate up to 5 Platform Funds from which units are to be sold. In the event of these funds being fully eroded your intermediary will be contacted who will contact you for further instructions.

Fund Manager and Fund Name	Percentage of Regular Withdrawal
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<b>TOTAL</b>	<b>100 %</b>

## 4 Authorisation (Intermediary use only)

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

Intermediary signature  X  Date

### Office use only (Suffolk Life)

Suffolk Life confirms the Intermediary has the Investor's authority to sign this instruction on their behalf.

Suffolk Life signature  X  Date