

Zurich Trustee Investment Plan

Withdrawal application

Name of Scheme

Plan number

Please complete the appropriate sections below if you would like to withdraw money from your plan.

An early cancellation charge may apply to payments you have made to your plan. Please see your Plan Schedule or Current plan details to see if this might apply to you.

Regular withdrawals

Please tick if you would like to take regular withdrawals from the plan ☐

(This is only available if your fund value is at least at our minimum level, currently £50,000. The maximum regular withdrawal allowed is 7.5% of the fund value each year).

Please indicate preferred withdrawal option:

fixed amount (please specify amount)

£

or fixed percentage of fund value (please specify percentage)

%

Please indicate the frequency of withdrawals

☐ monthly

☐ quarterly

☐ half-yearly

☐ yearly

Date on which withdrawals are to start

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Do you want to take the regular amount by cashing in units in proportion to the value held in each fund?

☐ Yes

☐ No

If no, please complete the 'fund selection' table below to indicate the amount to be taken from your funds (not available if you have chosen fixed percentage withdrawals).

Partial withdrawal

Please tick if you would like to take a partial withdrawal ☐

Please specify the amount

£

Do you want to take the amount by cashing in units in proportion to the value held in each fund?

☐ Yes

☐ No

If no, please complete the 'fund selection' table below to indicate the amount to be taken from your chosen funds.

Fund selection

Fund name	Amount (£)

Total withdrawal

Please tick if you would like to cash in your whole plan (ie. withdraw all the funds invested) ☐

Please return this form together with your original Plan schedule to take a total withdrawal.

Payee details

Name of bank

Name of account

Account number

Sort code

Your reference

Address

Postcode

If you are taking a partial withdrawal or total withdrawal and would like payment by cheque, please indicate who the cheque should be made payable to

Cheques will normally be made payable to the Scheme or Trustees.
A charge will be made for payments by Telegraphic Transfer.

Address to send cheque

Postcode

Declaration

I/We confirm that the withdrawal is to provide benefits in accordance with the terms and conditions.

I/We understand that on payment of the value of the units cashed in, Zurich Assurance Ltd will be discharged from all further liabilities in respect of them.

Name and signature of the authorised Trustee or of all the Trustees

Name

Signature

Name

Signature

Name

Signature

Name

Signature

Date