

Flexible Guarantee Bond

Regular Withdrawal Request Form



Please use this form if you want to take regular withdrawals from your Bond.

Please see your Key Features document and the Bond Conditions if you have any queries, or contact us.

You can get this and other documents from us in Braille or large print, by contacting us.

Withdrawal Details

Bond Number

How often do you wish to take money out of your Bond? (tick one only)

Monthly 3 Monthly 6 Monthly Yearly

How much do you want to take out? (Minimum £50, in whole pounds only)

£ each payment

OR % a year of the original investment

If you take out more than 5% per year (cumulative) of the premium paid, this could have an impact for income tax purposes or on any age allowance or tax credits you receive. Tax treatment depends on your personal circumstances. Please refer to the Key Features for details of how benefits from the Bond will be taxed. Any references we make to taxation are based on our understanding of current legislation and HM Revenue & Customs practice, which can change.

Please tick this box if the amount you are requesting is above the 5% limit to confirm you are aware of the tax implications

When would you like to start taking withdrawals?

Day of month (from 1st to 28th) Month and year /

Please tell us how you'd like to receive this? Direct to your bank/building society account Cheque

This is to allow 5 working days for the payment to reach the account for **every** payment.

If you'd like us to pay your withdrawals directly to your bank/building society account, please provide details below:

Name of bank/building society

Address

Postcode

Name(s) in which account is held

Account Number Sort Code

If this is a different account to the one you used to fund your original investment, we'll need evidence of account ownership. Please enclose a bank statement for this account (from the last three months) with this form. Otherwise, we'll have to pay your withdrawals by cheque.

Notes

Regular withdrawals are applied equally across all 50 policies within your Bond.

If you take out more than 5% of the premium paid (on a regular or occasional basis) during any of the first five years (from the date your Bond started), we'll apply an exit charge and cancel additional units to meet this charge. If you don't take the full 5% in any year, any unused amount can be rolled forward to later years.

Any payments will be made to the legal Owners of the bond. If the Bond Owner(s) change, we'll need to verify the identity of the new Bond Owner(s) before making any payments.

For jointly owned Bonds, if you want payments to be paid to one owner only, please confirm who is to receive the payments below and both Bond Owner(s) must sign this form.

Payee Name

For joint Bonds all Bond Owners/Trustees must sign below:

Bond owner/Trustee name

2nd Bond owner/Trustee name

Signature

Signature

Date / (DD/MM/YYYY)

Date / (DD/MM/YYYY)

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