

Regular cash withdrawal form



This form allows you to set up a regular cash withdrawal from your Stocks and shares ISA or Dealing account to your nominated bank or building society account. To request a one-off withdrawal, please log in to your account online and select 'Withdraw cash'.

Need to change your nominated bank or building society account? Please do it before sending us this form. Just log in to your account and select 'Update my details', then 'Change my bank details'.

Remember that when withdrawing money from an ISA, you won't be able to pay it back in if you've reached your annual subscription limit for this tax year.

If you would like a copy of this or any other item of our literature in large print, Braille or in audio format, please contact us on 0345 54 32 600 or by email at help@ajbell.co.uk.

Please use BLOCK CAPITALS only and blue or black ink.

Cash withdrawal instruction

Please complete the following details and then sign and return this form to us.

Customer name

Account number

I would like to set up a regular withdrawal from my:

Stocks and shares ISA

Dealing account

Regular payment

Please pay the following amount into my nominated bank/building society account.

£

(fixed amount)

or

Consolidated natural income (all income generated from your investments that has been paid into your cash account will be paid to your nominated bank account).

Frequency:

monthly

quarterly

half yearly

annually

Start date

End date (this section is optional)

If you would like to receive your payments for a specific period of time, please enter an end date above.

Payment will be made to your nominated bank/building society by BACS on the first working day of the month. Your money should be available in your nominated account within 4 working days. Please note, we will need to be in receipt of a completed form at least 5 working days before the first payment is due.

Declaration

I hereby request and consent to the payment of funds as set out in this form and accept that it is my responsibility to ensure that there is sufficient cash in my account to pay the amount(s) as they fall due. I understand that if there is insufficient cash in my account then no payment will be made.

I accept that it is my responsibility to check that the payment has been received in my nominated bank/building society account.

I am aware that if I am withdrawing cash from my ISA, I will only be able to pay cash back in up to my unused subscription allowance for the tax year. I understand that the tax benefits on the withdrawn money will be lost.

Please sign and date this form and return it to

AJ Bell
4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Name

Date

Signature