

# Withdrawal Instruction Form



Please complete one application form per client reference.

Please complete this application form using black ink in BLOCK CAPITALS and return to: Cofunds Limited, PO Box 1103, Chelmsford CM99 2XY

## 1 Adviser/Intermediary Details (For adviser/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. Please note: our system will be updated to link the client to this Intermediary Authorisation Code.

Cofunds Intermediary Authorisation Code

## 2 Personal/Company Details (Please complete this section in full)

**Primary holder.** Please see Section 3 for joint holders.

Existing Cofunds Client Reference

Designation (if applicable)

Mr/Mrs/Ms/Miss/Other

Surname

or company name

Full first name(s)

## 3 Joint Holders (All joint holders MUST complete this section)

Please include the full name of each holder. All correspondence will be sent to the primary holder above. Joint holders must have the same investment service as the primary holder.

### Second holder

Mr/Mrs/Ms/Miss/Other

Surname

Full first name(s)

### Fourth holder

Mr/Mrs/Ms/Miss/Other

Surname

Full first name(s)

### Third holder

Mr/Mrs/Ms/Miss/Other

Surname

Full first name(s)

## 4 Withdrawal Instruction

Please indicate where you would like the withdrawal to be paid to. If you do not choose one of the options below, we'll pay the proceeds of your withdrawal by cheque to your registered home address.

Please note: any withdrawals made from the Cofunds Investment ISA will result in the loss of any tax efficiencies.

### Option 1 – Cofunds Cash Account

Please ensure that the holders and designation of the cash account match that of the investment the withdrawal is coming from.

### Option 2 – BACS transfer to your nominated bank account

To set up a new nominated bank account, please enter the details below. This account will become your nominated account for all existing investments you hold in your platform account.

Name of account holder

Branch Sort Code

Bank or Building Society name and address

  
  
  

Bank/Building Society Account Number

Building Society Roll Number (if applicable)

Cofunds only allows withdrawal proceeds to be paid to your nominated bank account if the account has been verified by your adviser/intermediary. To do so, please ensure your adviser/intermediary completes Section 4A.

If your bank account isn't verified, we'll pay the withdrawal proceeds by cheque to your registered home address.

### Option 3 – Cheque

We will pay the proceeds of your withdrawal by cheque to your registered home address.

