

Withdrawal form

This form is for when you want to withdraw all or part of your Healthy Investment, Investment Bond. After completion it must be returned to Healthy Investment. If you are withdrawing your entire bond you must return your original policy document.

Before you cash in your bond or make a withdrawal you should consider if there are any tax consequences of making the withdrawal. We can answer factual questions about the tax treatment of bonds in general but you might want to take independent financial advice relating to your personal circumstances.

If you have any questions or need help completing this form please contact us on 0161 762 5790

Your details:

Full name

Policy No.

Withdrawal:

Tick

Tick

amount or %

Full surrender

Part withdrawal

Remittance:

Bank Name

Branch

Sort Code

Account Name

Account No.

Building Society roll / reference:

Contact details:

If we need to contact you regarding your surrender or investments the best way is:

Telephone / Email

Declaration:

I/we wish to fully or partially cash in the above Investment Bond. I/we have received a current valuation of the policy which clearly explains any early surrender penalty or market value reduction that are being applied at the time of encashment and I/we accept these deductions if they are applicable.

I/we being the person(s) legally entitled to the above policy request that you pay the amount stated above and agree that this payment available under this policy constitutes a discharge of Healthy Investment's obligations.

Tick

My policy document is enclosed

If the bond is held in joint names or trust all parties must sign this form.

Signed: _____

Dated: _____

Signed: _____

Dated: _____

Please complete and return to:

Healthy Investment, 2 The Old Court House, Tenterden Street, Bury BL9 0AL
Tel: 0161 762 5790 Email: enquiries@healthyinvestment.co.uk

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