

Withdrawal form

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

Before you cash in your ISA remember that you may not be able to reinvest the monies in an ISA if the amount you withdraw is more than the current ISA limit or you have already used part of your ISA allowance. If you are transferring your ISA to another provider do not use this form.

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

Your details:

Full name	Policy No.
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Withdrawal:

Full surrender	Tick <input type="checkbox"/>	Part withdrawal	Tick <input type="checkbox"/>	amount or % <input type="text"/>
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Remittance:

Bank Name

Branch	Sort Code
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Account Name	Account No.
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Building Society roll / reference

Contact details:

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

Telephone / Email	<input type="text"/>
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Declaration:

I wish to fully or partially cash in my Healthy Investment ISA. I have received a current valuation of the policy which clearly explains any early surrender penalties or market value reductions that are being applied at the time of encashment and I accept these deductions if they are applicable.

I being the person 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.

My policy document is enclosed	Tick <input type="checkbox"/>
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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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