

Withdrawal Request

UK Pension monies

Please complete this form to request a payment from your Garrison Bridge Superannuation Scheme which includes UK sourced pension funds. UK tax provisions may apply if you are UK resident, or have been within the last ten tax years.

Member Details

Full Name

Garrison Bridge member number

Date of Birth (DD/MM/YYYY)

Current investment strategy

Select which fund you are currently invested in and would like to withdraw from:

Please *indicate a % or select a £ or \$ amount or circle ALL.*

NZD Conservative Passive Fund

 % *Or* NZD\$ *Or* ALL

NZD Growth Passive Fund

 % *Or* NZD\$ *Or* ALL

AUD Balanced Passive Fund

 % *Or* AUD\$ *Or* ALL

GBP Conservative Passive Fund

 % *Or* GBP£ *Or* ALL

GBP Growth Passive Fund

 % *Or* GBP£ *Or* ALL

GBP Moderate Active Fund

 % *Or* GBP£ *Or* ALL

GBP Balanced Active Fund

 % *Or* GBP£ *Or* ALL

GBP Growth Active Fund

 % *Or* GBP£ *Or* ALL

Bank account information

You must provide us with bank account details which is in the same name as your Garrison Bridge Superannuation Scheme holding.

Name of account

Bank name and branch

Account number

International Swift details if applicable

Account currency

Benefit payments

Complete this section to withdraw a regular income or lump sum payment in accordance with the standard Garrison Bridge Superannuation Scheme rules.

Regular income

Income Amount

Fortnightly

Monthly

Annually

Start Date (DD/MM/YYYY)

End Date (if applicable)

Lump sum payment

Lump sum

A lump sum payment of:

GBP

AUD

NZD



Declaration

I confirm that I wish for the Manager of the scheme to proceed with the above withdrawal request. I understand that in making this withdrawal, in some circumstances a withdrawal of funds may be liable for tax. The Manager is required to report to HMRC all withdrawals within ten years of the original transfer date.

I confirm this withdrawal is under flexible access rules

Members signature

Date (DD/MM/YYYY)

The below outlines the personal identification documents we require in order to process the withdrawal request. These documents must either be certified by a trusted referee or verified by the adviser

Member signature

Identification

Proof of bank account

