

HARCOURT LIFE

Regular Withdrawal Request Form

Please complete this form using BLOCK CAPITALS. In addition, for bonds that commenced on or after 1 January 2001, please complete the form 'Declaration of Residence Outside Ireland'.

STEP 1		BOND DETAILS	
Contract Type (tick one box only)			
<input type="checkbox"/> Investment Bond		<input type="checkbox"/> Inheritance Plan	
<input type="checkbox"/> Complete Investment Portfolio		<input type="checkbox"/> Universal Capital Account	
<input type="checkbox"/> Guaranteed With Profit Bond		<input type="checkbox"/> Flexible Investment Plan	
<input type="checkbox"/> Portfolio Bond			
PLAN NUMBER		<input type="text"/>	

STEP 2		OWNERS OF THE BOND - PERSONAL INVESTORS ONLY	
Owner 1		Owner 2 (if any)	
Title (please tick)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other (in full)	Title (please tick)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other (in full)
Surname	<input type="text"/>	Surname	<input type="text"/>
Forename(s) (in full)	<input type="text"/>	Forename(s) (in full)	<input type="text"/>
Address (for correspondence)	<input type="text"/>	Address (for correspondence)	<input type="text"/>
	<input type="text"/>		<input type="text"/>
	Postcode		Postcode
Owner 3 (if any)		Owner 4 (if any)	
Title (please tick)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other (in full)	Title (please tick)	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other (in full)
Surname	<input type="text"/>	Surname	<input type="text"/>
Forename(s) (in full)	<input type="text"/>	Forename(s) (in full)	<input type="text"/>
Address (for correspondence)	<input type="text"/>	Address (for correspondence)	<input type="text"/>
	<input type="text"/>		<input type="text"/>
	Postcode		Postcode
If there is an additional owner of the bond, please copy Step 2, complete the corresponding details for the additional owner and attach the completed page to this Regular Withdrawal Request Form.			

STEP 3**OWNERS OF THE BOND - TRUSTEE/CORPORATE INVESTORS ONLY**

Name of Trust/Corporate Body

Address (for correspondence)

Postcode

Please complete the details below for all of the Trustees/Authorised Signatories who are authorised to give instructions relating to the bond.

Name of Trustee/Authorised Signatory 1

Name of Trustee/Authorised Signatory 2 (if any)

Name of Trustee/Authorised Signatory 3 (if any)

Name of Trustee/Authorised Signatory 4 (if any)

If there is an additional trustee/authorised signatory of the bond, please copy Step 3, complete the corresponding details for the additional trustee/authorised signatory and attach the completed page to this Regular Withdrawal Request Form.

STEP 4**WITHDRAWAL DETAILS**

A Withdrawal Amount

*Delete as appropriate

(min amount £200/E300/US\$300)

(See note 1)

OR

B Withdrawal % of Fund Value

 %

(See note 2)

Frequency of withdrawal payments (tick one box only):

 Monthly Quarterly Half-Yearly Yearly

Start date of regular withdrawal payments

 / /

(day/month/year)

Payment Details

The regular withdrawal payments can be made by cheque, telegraphic transfer to a Bank or direct credit to a UK Sterling bank or building society account. Payments made by telegraphic transfer will incur a bank charge. Payments can also be made by cheque to a private address.

Method of payment: (See note 5)

 Telegraphic Transfer Direct Credit

Address

Account Name

Account Number

SWIFT/Sort Code

Building Society Reference Number (if applicable)

Note:

1. The maximum regular withdrawals you may take in any year will depend on the contract type.
2. Percentage withdrawal of fund value is not an option for the Guaranteed With Profit Bond or the Complete Investment Portfolio. We will not pay the regular withdrawal if the calculated figure falls below the minimum amount.
3. The cost of telegraphic transfers will be deducted from the regular withdrawal payment before it is paid. So, for example, if you choose a regular withdrawal of £300 to be paid monthly, what will be paid is £300 less the cost of the transaction.
4. For the Complete Investment Portfolio, apart from the SMI Portfolio, all withdrawals are taken from the Cash Account. Withdrawals from SMI Portfolio will be taken on a pro rata basis from all the investments if more than one investment has been chosen. Any withdrawal from a With Profits Fund must not exceed the Annual MVR Free Allowance for that fund.
5. Depending on the contract type the value of the units cancelled will take account of any Terminal Bonus, Market Value Reduction, Allocation Charge or Surrender Charge that may apply.

STEP 5 DECLARATION

I declare that I have the authority to give instructions in respect of the above numbered Plan. I instruct Harcourt Life to make regular withdrawal payments in accordance with the details above.

Signature of Owner/Trustee/Authorised Signatory 1

Date

 / /

Signature of Owner/Trustee/Authorised Signatory 2 (if any)

Date

 / /

Signature of Owner/Trustee/Authorised Signatory 3 (if any)

Date

 / /

Signature of Owner/Trustee/Authorised Signatory 4 (if any)

Date

 / /

If there are additional owners/trustees/authorised signatories of the bond, please copy this page, complete the corresponding details for each additional owner/trustee/authorised signatory and attach the completed page to this Regular Withdrawal Request Form.

PRIVACY STATEMENT

Our Privacy Statement explains when and why we collect personal information about our customers, how we use it, the conditions under which we may share it with others and how we keep it secure. It also explains how long we keep customer information for, how a customer can obtain details of the information we keep and the choices customers have about how we use that information. You can find a copy on our website www.harcourtlife.ie or you can request a copy from our Customer Service Team.

Not for distribution in the USA or Canada

Address for correspondence: Harcourt Life Ireland Designated Activity Company, 16 Joyce Way, Park West Business Park, Dublin 12, Ireland.

Telephone number (+353-1) 804 4000. Telephone calls may be recorded.

Fax (+353-1) 804 4005. Website address: www.harcourtlife.ie

Harcourt Life Ireland Designated Activity Company is regulated by the Central Bank of Ireland and is registered in Ireland (Company No. 242244). The company's registered office is Block 2, Harcourt Centre, Harcourt Street, Dublin 2, Ireland. Directors: William Finn - Chairman, Alan Foley - Chief Executive, Matthew Coffey, Tim Madigan, Ian Maidens (British), Henry O'Sullivan, Paul Thompson (British).

MZE001/0418

HARCOURT | **LIFE**