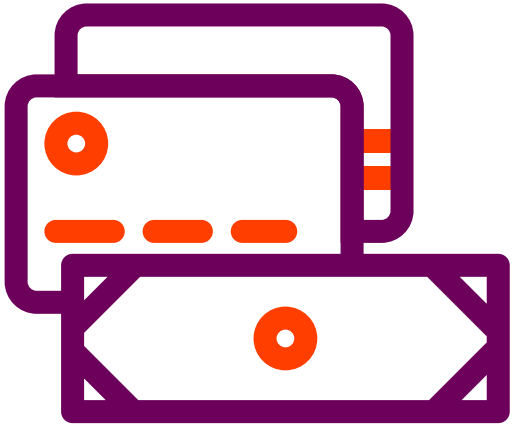
For advisers

Our new platform

nucleus platform



How to process a GIA regular withdrawal

2 minute read

How to process a GIA regular withdrawal

Withdrawal details 5

Review 8

How to use this document

Important information will look like this.

Key messages

Key messages will look like this.



Useful info will look like this.

We recommend using the zoom function to view the details on the platform screens in this guide.

How to process a GIA regular withdrawal

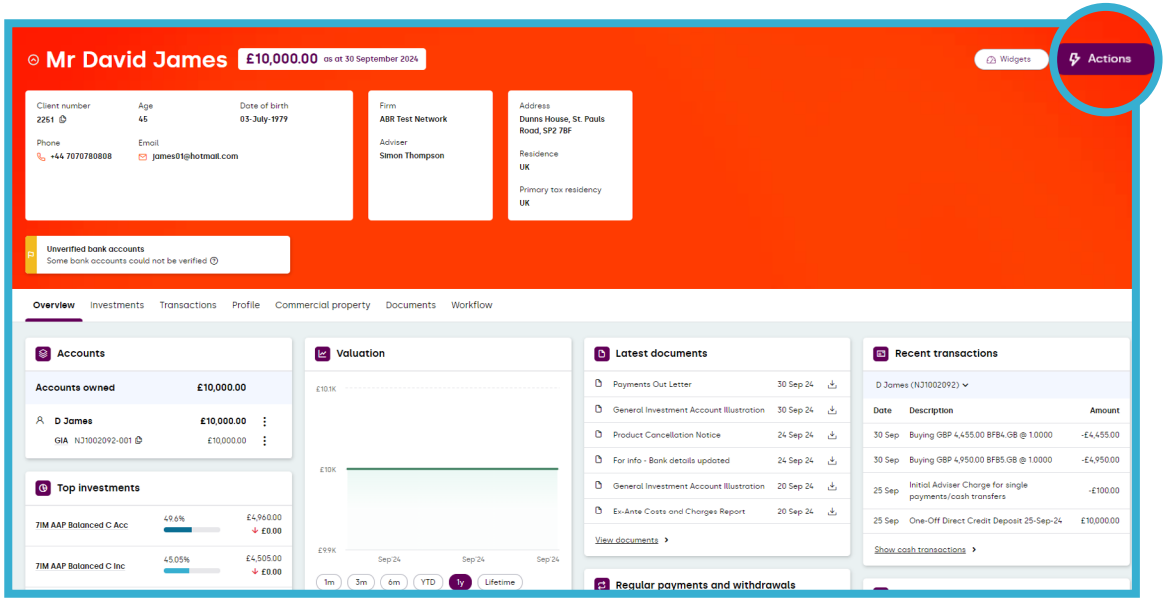
To start the GIA regular withdrawal process, you first need to search for your client. Please refer to the guides on our website to search for a client or create a new client.

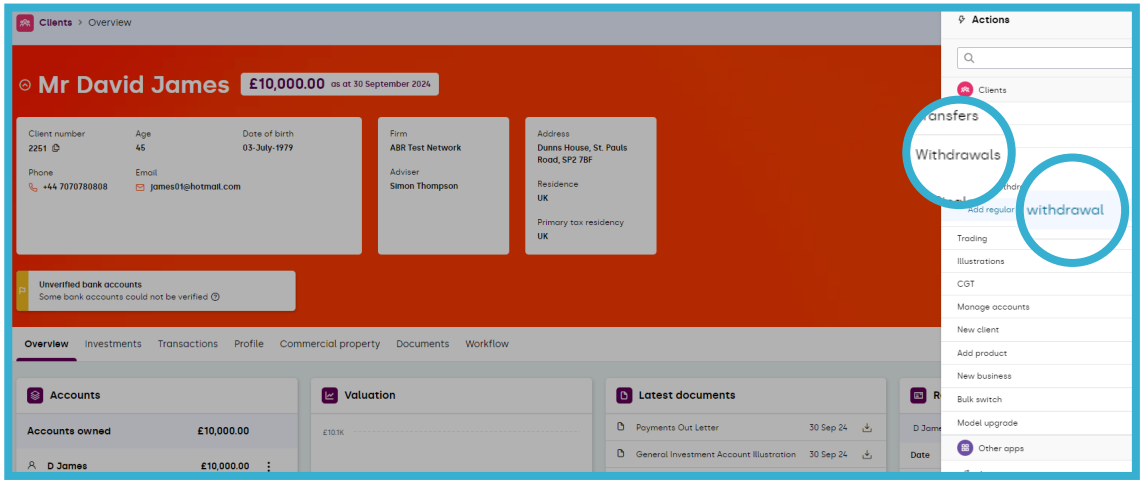
Once you've found your client, you can refer to this guide to submit the GIA regular withdrawal.

At least one bank account that's nominated for withdrawals is required to complete the transaction.

If you'd like to add a new bank account, follow the How to add or remove a client bank account guide.

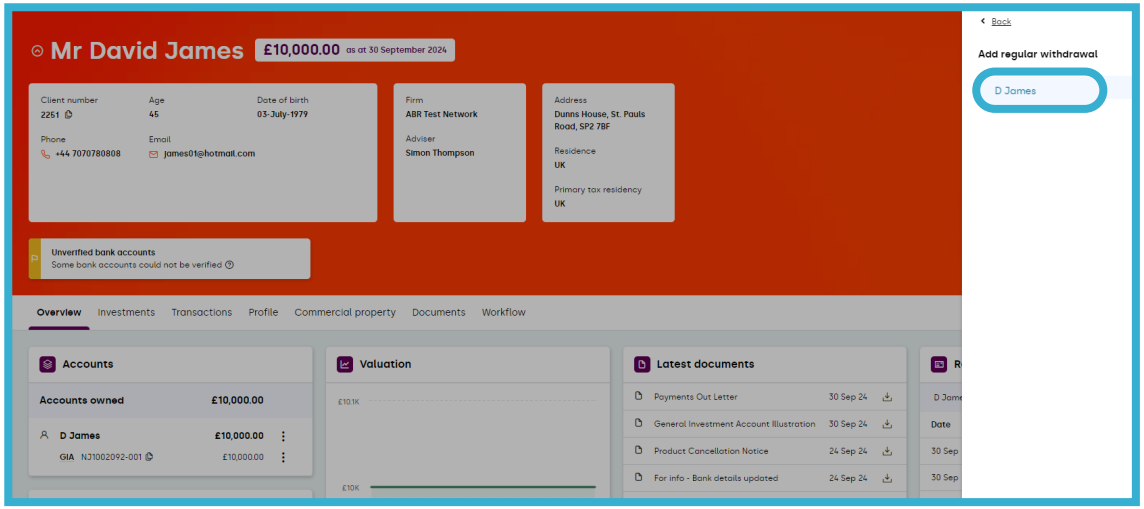
From the client landing page select the **'Actions'** button.



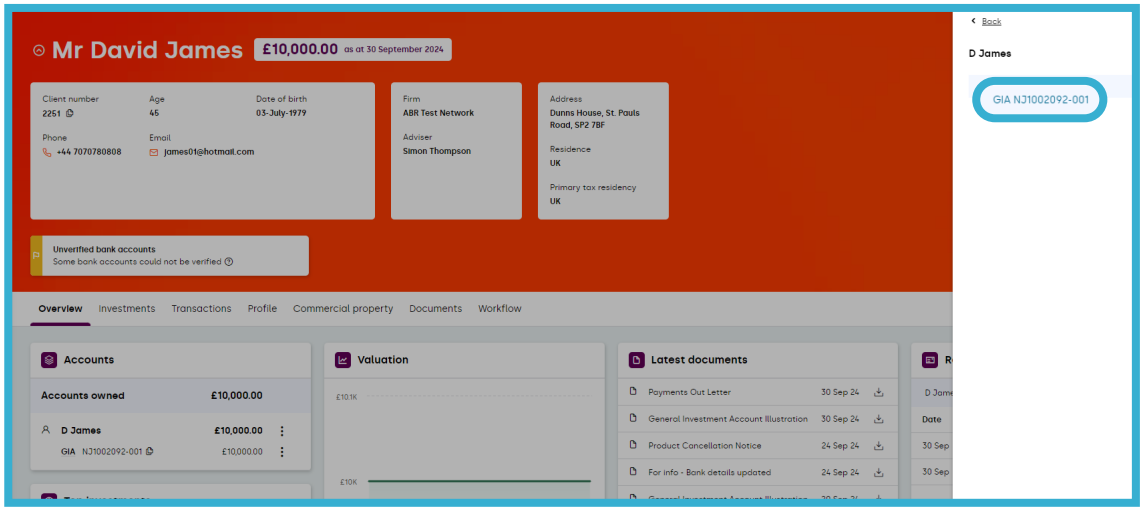


Select **'Withdrawals'** and then select **'Add regular withdrawal'**.

Select the client's **'head account'**.



Select the account you wish to set up a regular withdrawal for.



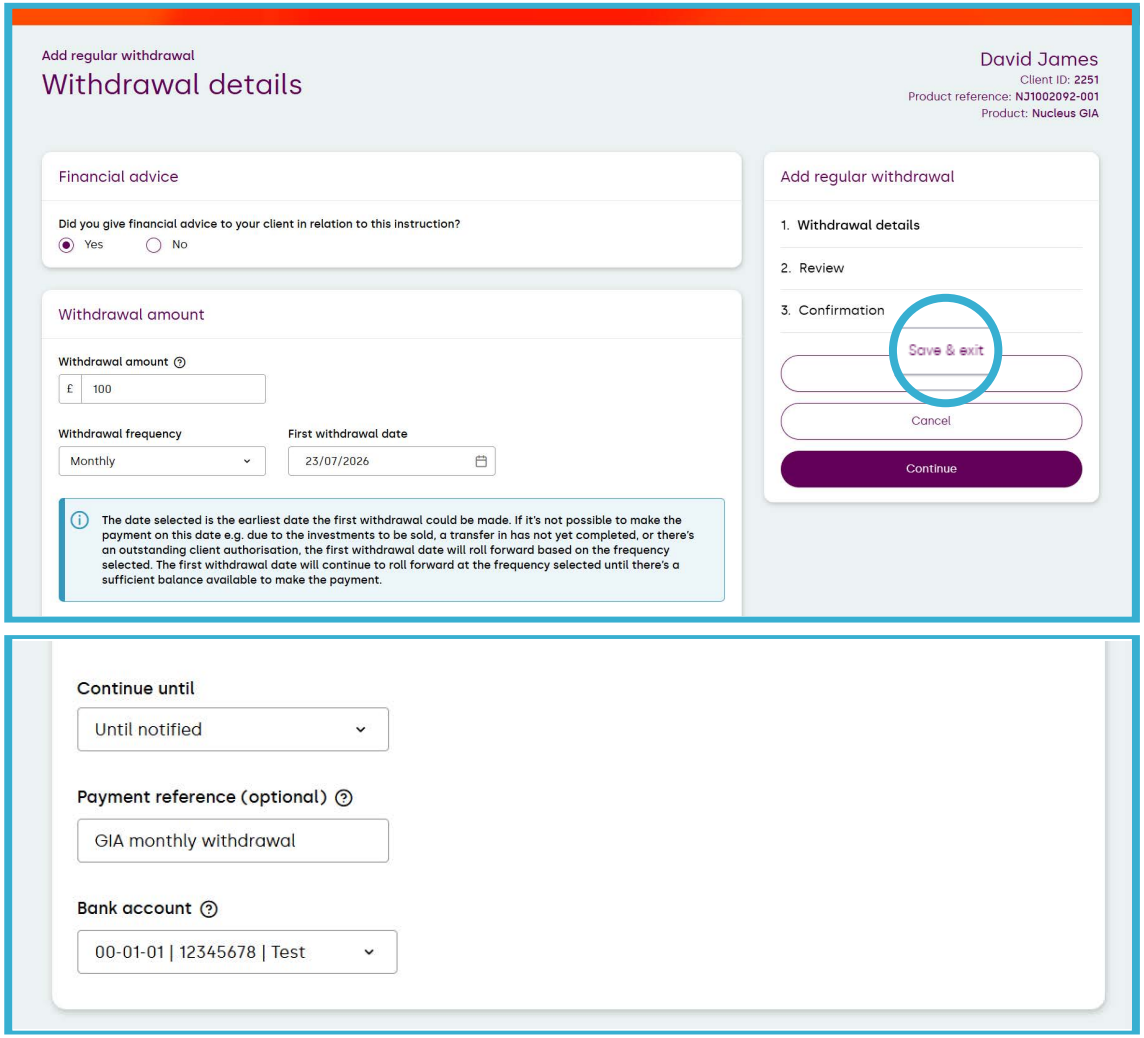
Withdrawal details

At any stage of the withdrawal, you can **'save and exit'** the transaction. You can resume this under the workflow tab within the client's account.

Confirm if advice has been given to your client.

Confirm withdrawal amount details.

The first withdrawal date can be any date from 1 – 28 of the month. However, there's a minimum of 12 working days required to set up the withdrawal instruction.



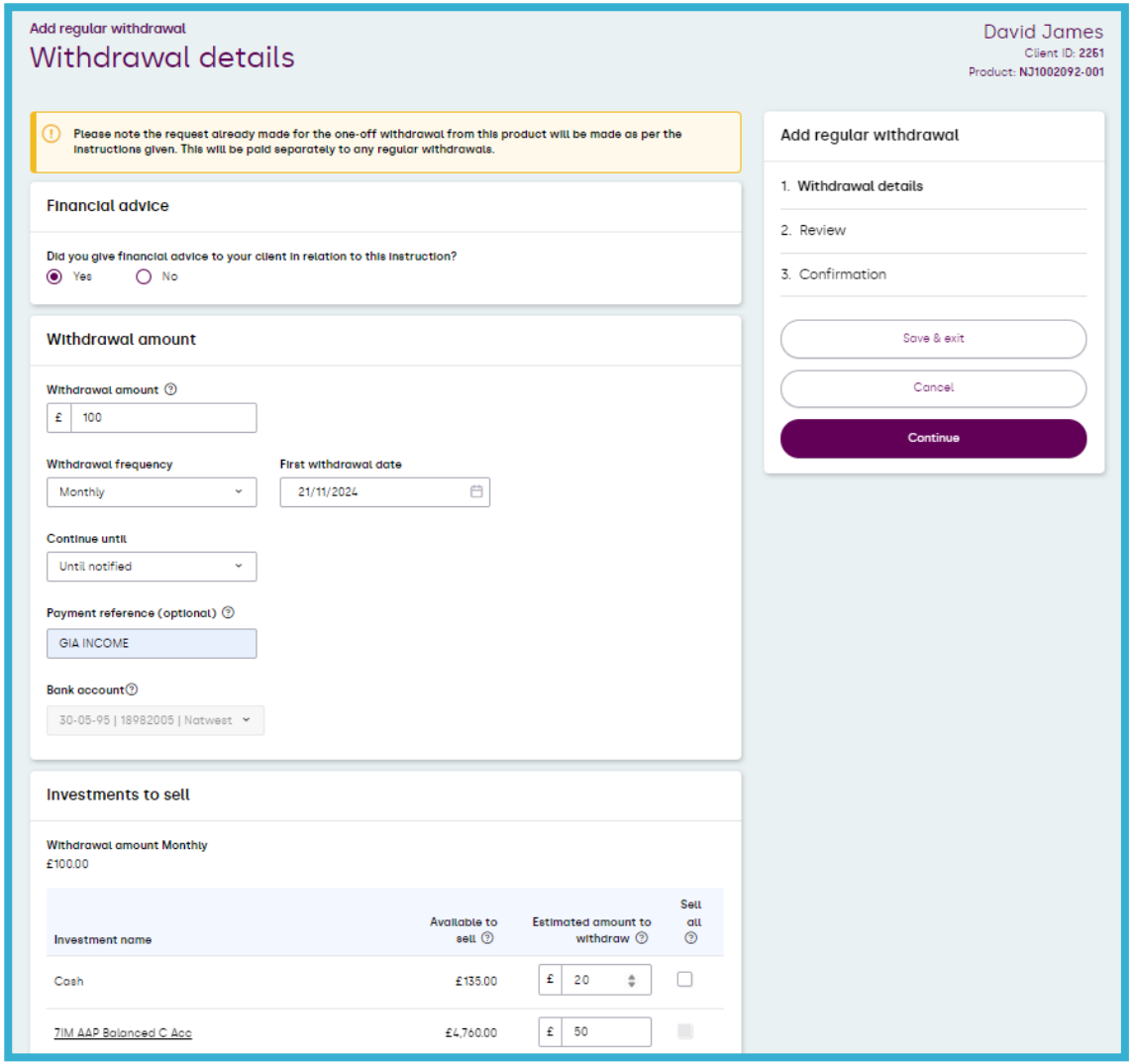
Confirm if you would like to add a reference to be used when making the payment.

Key message

Adding a reference will make it easy for your client to identify the payment in their bank account and on their bank statements. If you're using a Building Society, please enter the roll number here. Any reference you enter here will appear on your bank statements.

Select the nominated bank account from the drop-down list.

The bank account will be pre-populated if your client only has a bank account that's authorised for withdrawals. If no bank account is available or you would like to add a new bank account, follow the 'How to add or remove a client bank account' guide on our website.



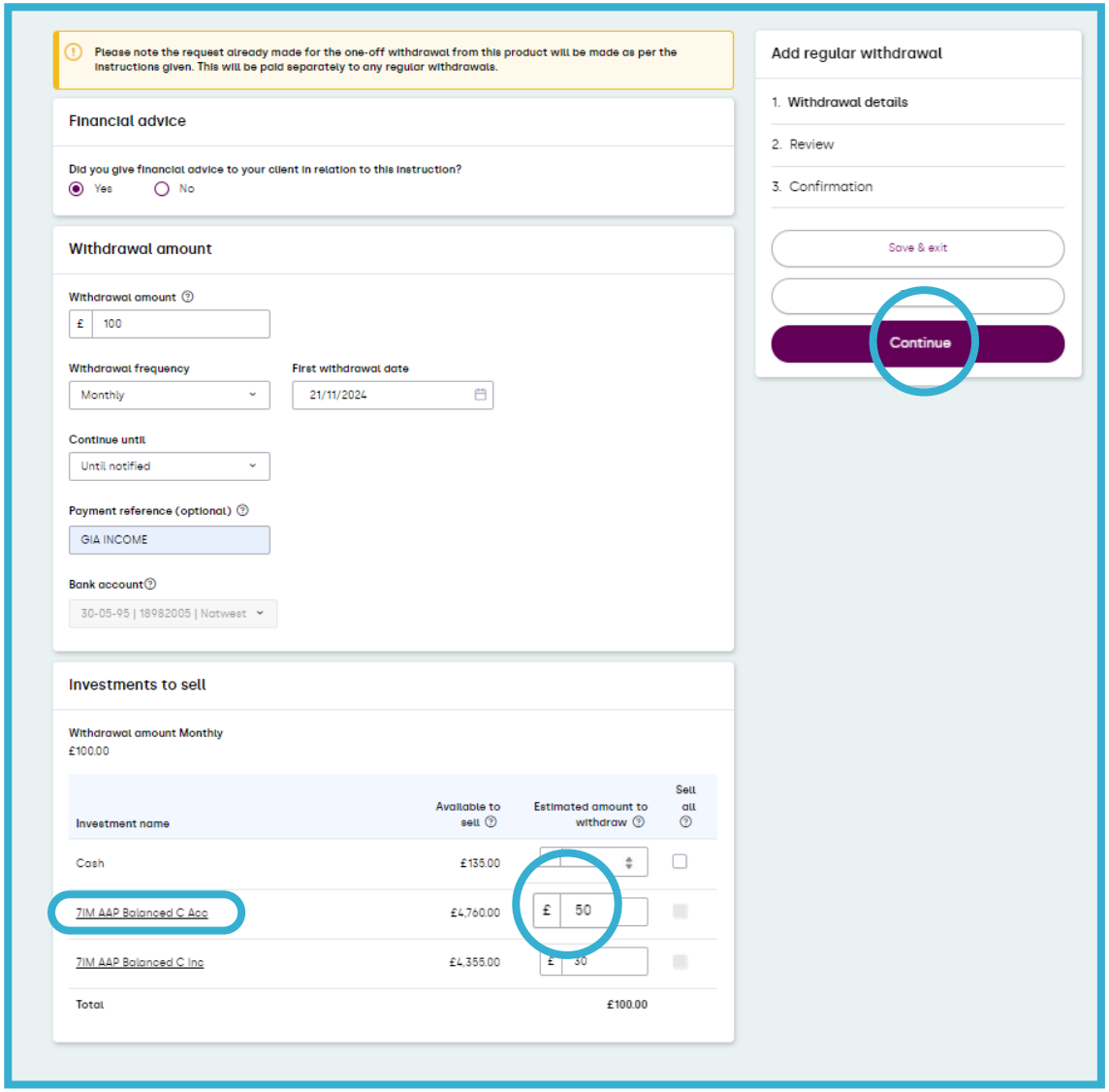
Confirm investments to sell and the estimated withdrawal amounts.

Selecting 'Sell all' will sell the whole investment to cover the regular withdrawal.

Where investments are sold in a GIA to make withdrawals, they will be a disposal for Capital Gains Tax (CGT) purposes. This means there may be tax to pay through the HMRC self-assessment process.

Once you're happy with all your withdrawal details, select **'Continue'** to move on to the review page.

Any single ad hoc withdrawals instructed from this account will be made as per the instructions given, these will be paid separately.



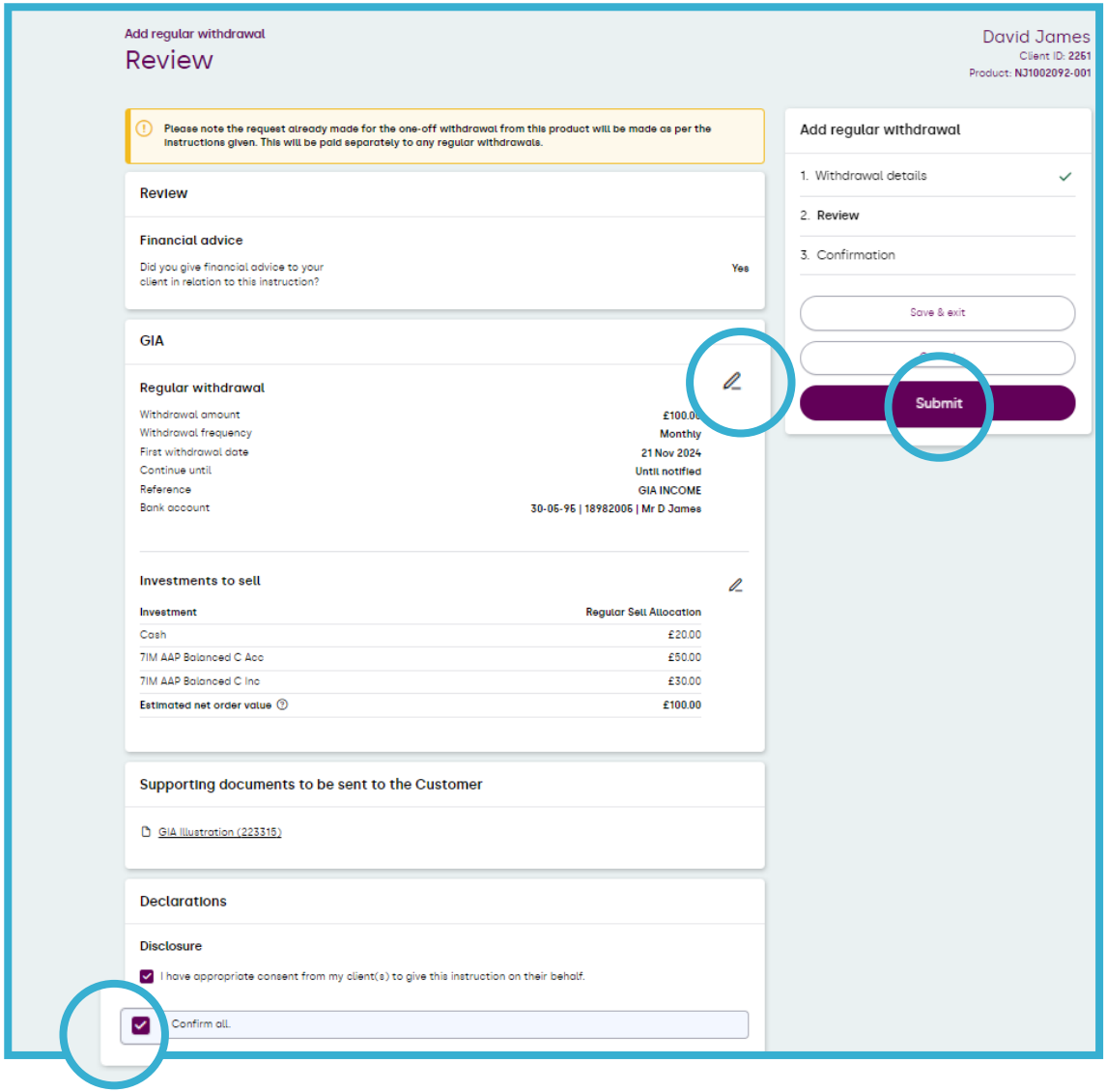
Review

Review the withdrawal details for accuracy. You can use the 'pencil' icons to make any necessary changes.

The illustration will be produced here. Documents can't be amended once submitted. If there are any amendments to be made to documentation you'll need to resubmit the withdrawal to generate new documents.

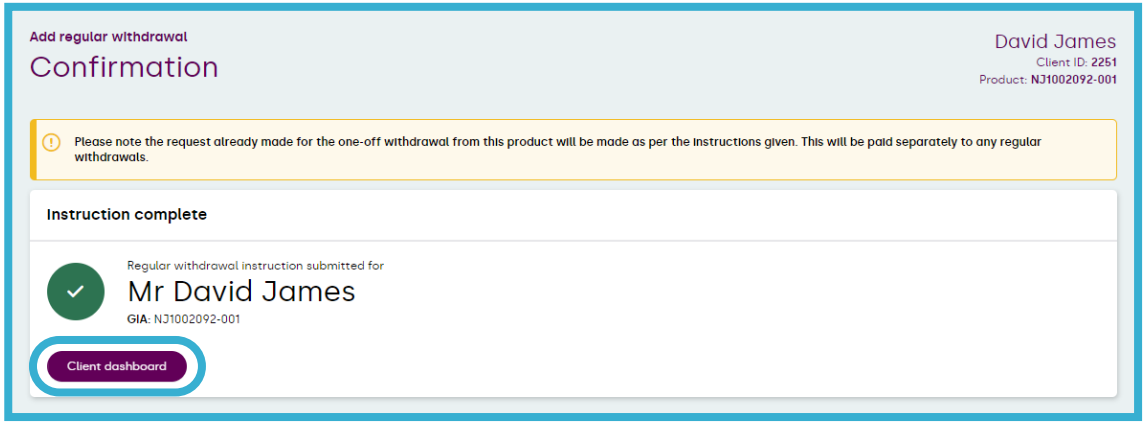
Please read the declaration and tick to confirm completion.

Select **'Submit'** to submit the regular withdrawal.



The regular withdrawal has been submitted.

You can select **'Client dashboard'** to return to the client's home page.



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For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 03455 212 414, or via the Typetalk service on 18001 03455 212 414.

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