Platform Holdings - Withdrawals

Last Modified on 25/09/2023 10:08 am BST

This article is a continuation of Platform Holdings - Contributions

Add withdrawals to a Holding by selecting New

Holding Collective Retirement Accou	int Fully Insured						F	Risk Rate Holding	Review Edit Delete		
Name Collective Retirement Account Fully Insured Provider Name Quilter Status In force	Description Test Personal Pension Desc Type (Basis) Name Personal Pension (Fully Insured) Contract Reference	ption Product Name Collective Retire Account Valuation Type	ment	Start Date End Date 22/09/2022 21/09/2033 Remaining Term Review Date 10 22/08/2024 Rolling Term Basis Last Modified Date 23/09/2023, 02:03 Surrender/Tansfer Value 148,523.00 Last Scale			C	LifeStrategy 60% Equ Shares Acc			
Reports View Tabular View Contributions (1) 1 item • Updated a few seconds ago					\$ • C	New	Performance Chart 1.4 1.2 1 1 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		_		
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1 C-000166 Regula	r Monthly	£200.00	Retail Price Ind	ex (RPI) 9%	9.00%	28/03/2023	200				
Withdrawals (0)		View All				New	021/09/20 View Report	023 Date	23/09/2023 As of Today at 10:00 C ^a		
tvoid(0)						New	Weighting By Class Allo	ation			

Select Regular, Single or Transfer:

Description	F	Remaining Term	Review Date				×
ne ic		New Withdrawal					
Select a record type							
	$oldsymbol{O}$	Regular					
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Complete the details of the Withdrawal:

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*Frequency	
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* Start Date	
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	*FrequencyNone *Start Date End Date

New Withdrawal: Regular											
Withdrawal Details											
*Amount £300.00 Indexation • None •	*FrequencyNone Monthly BiMonthly										
Collective Retirement Account Fully Insured ×	Quarterly Half Yearly Annually Single										

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Once the fields are complete, **Save**

Vithdrawal Details			
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£300.00		Annually	•
Indexation (1)	5	* Start Date	÷
Retail Price Index (RPI) 9%	•	23/08/2023	苗
* Holding		End Date	÷
Collective Retirement Account Fully Insured	×	15/09/2033	苗
*Holding		End Date	

The withdrawal can be found on the details screen of the holding:

Name Collective Retirement Account Fully Description Test Personal Pension Description Provider Name Quilter Type (Basia) Name Personal Pension (Fully Insured) Product Name Collective Retire Account Status In force Contract Reference Valuation Type		Test Personal Pension Description Test Personal Pension Description Type (Basis) Name Product Name Product Name Personal Pension (Fully Collective Retirement Insured) Contract Reference		21/09/2033 Review Date 22/08/2024 Last Modified Date		100.00% - Vanguard LifeStrategy 60% Equity A Shares Acc
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Withdrawal Id ✓ Record Ty 1 W-000019 Regular	pe V Frequency V Amo Annually £300		 ✓ Indexation 1) 9% 9.00% 	n \varnow Start Date \varnow 23/08/2023	Weighting By Class All	ocation 40.90% - Global Equities (ev. UK) 22.40% - Global Bonds (ex.
		View All				UK) 14 9/9% - LIK Fruities

If you would like to edit the withdrawal, select **Edit** under the drop down arrow:

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