

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**

The screenshot displays the 'Collective Retirement Account | Fully Insured' page. It includes a top navigation bar with 'Risk Rate Holding', 'Review', 'Edit', and 'Delete' buttons. The main content area is divided into several sections:

- Account Details:** Name (Collective Retirement Account | Fully Insured), Description (Test Personal Pension Description), Start Date (22/09/2022), End Date (21/09/2033), Remaining Term (10), Review Date (22/08/2024), Rolling Term Basis, Last Modified Date (23/09/2023, 02:03), and Surrender/Transfer Value (148,523.00).
- Reports View:** A 'Tabular View' section showing 'Contributions (1)' with a table containing one record: Contribution ID C-000166, Record Type Regular, Frequency Monthly, Amount £200.00, Indexation Retail Price Index (RPI) 9%, Indexation 9.00%, and Start Date 28/03/2023. Below this is a 'Withdrawals (0)' section with a 'New' button.
- Performance Chart:** A chart showing 'Sumnet Value' over time, with a legend for '100.00% - Vanguard LifeStrategy 60% Equity A Shares Acc'.

Select Regular, Single or Transfer:

The screenshot shows a 'New Withdrawal' dialog box with the following elements:

- Title:** New Withdrawal
- Form:** A section titled 'Select a record type' with three radio button options: Regular (selected), Single, and Transfer.
- Buttons:** 'Cancel' and 'Next' buttons at the bottom right.

Complete the details of the Withdrawal:

New Withdrawal: Regular

Withdrawal Details

*Amount

*Frequency

Indexation ⓘ

*Start Date

*Holding

End Date

New Withdrawal: Regular

Withdrawal Details

*Amount

*Frequency

Indexation ⓘ

*Holding

End Date

- ✓ --None--
- Monthly
- BiMonthly
- Quarterly
- Half Yearly
- Annually
- Single

New Withdrawal: Regular

Withdrawal Details

*** Amount**

*** Frequency**

Indexation

--None--

✓ --None--

None

Average Weekly Earnings (AWE) 7.8%

Consumer Price Index (CPI) 6.8%

Retail Price Index (RPI) 9%

Other

*** Start Date**

End Date

New Withdrawal: Regular

Withdrawal Details

*** Amount**

*** Frequency**

Indexation

*** Start Date**

*** Holding**

End Date

March							2022
Mon	Tue	Wed	Thu	Fri	Sat	Sun	
28	1	2	3	4	5	6	
7	8	9	10	11	12	13	
14	15	16	17	18	19	20	
21	22	23	24	25	26	27	
28	29	30	31	1	2	3	
4	5	6	7	8	9	10	

Today

Once the fields are complete, **Save**

New Withdrawal: Regular

Withdrawal Details

*** Amount** ↶

*** Frequency** ↶

Indexation ↶

*** Start Date** ↶

*** Holding**


End Date ↶

Cancel Save & New Save

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

Name Collective Retirement Account Fully Insured	Description Test Personal Pension Description
Provider Name Quilter	Type (Basis) Name Personal Pension (Fully Insured)
Status In force	Contract Reference
Product Name Collective Retirement Account	

Start Date 22/09/2022	End Date 21/09/2033
Remaining Term 10	Review Date 22/08/2024
Rolling Term Basis	Last Modified Date 25/09/2023, 10:00
Surrender/Transfer Value 148,523.00	



100.00% - Vanguard LifeStrategy 60% Equity A Shares Acc

Reports View **Tabular View**

Contributions (1) ⌵ ⌵ ⌵ New

1 item • Updated 6 minutes ago

Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End	
1	C-000186	Regular	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	28/03/2023	01/

[View All](#)

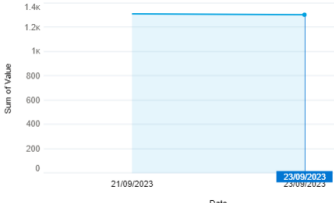
Withdrawals (1) ⌵ ⌵ ⌵ New

1 item • Updated 2 minutes ago

Withdrawal Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	
1	W-000019	Regular	Annually	£300.00	Retail Price Index (RPI) 9%	9.00%	23/08/2023

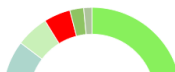
[View All](#)

Performance Chart




View Report As of Today at 10:03 ⌵

Weighting By Class Allocation



- 40.90% - Global Equities (ex UK)
- 22.40% - Global Bonds (ex UK)
- 14.00% - UK Fixed Income

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

 **Contributions (1)**

1 item • Updated 6 minutes ago

  [New](#)

<input type="checkbox"/>	Contribution Id ▾	Record Type ▾	Frequency ▾	Amount ▾	Indexation ▾	Indexation... ▾	Start Date ▾	End Date ▾
1	C-000166	Regular	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	28/03/2023	01/09/2023

[View All](#)

 **Withdrawals (1)**

1 item • Updated 3 minutes ago

  [New](#)

<input type="checkbox"/>	Record Type ▾	Frequency ▾	Amount ▾	Indexation ▾	Indexation... ▾	Start Date ▾	End Date ▾	Edit
	Regular	Annually	£300.00	Retail Price Index (RPI) 9%	9.00%	23/08/2023	15/09/2023	Delete

[Edit](#)
[Delete](#)

[View All](#)