

Generic Holdings - Withdrawals

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This article is a continuation of [Generic Holdings - Contributions](#)

Add withdrawals to a generic holding by selecting **New**:

The screenshot displays the 'Test Personal Pension | Fully Insured' holding page. At the top, it shows the holding name and a wrench icon. Below this, there are tabs for 'Details', 'Underlying Assets', 'Cash Accounts', 'Assets', 'Performance', 'Charges', and 'History'. The 'Details' tab is active, showing a grid of key-value pairs for the holding's details. To the right, there are two columns of date-related information. Below the details, there is a 'Reports View' section with a 'Tabular View' tab selected. This section shows a table of contributions with columns for Contribution Id, Record Type, Frequency, Amount, Indexation, Start Date, and End Date. A 'New' button is located in the bottom right corner of the contributions section.

Select **Regular**, **Single** or **Transfer**:

The screenshot shows a 'New Withdrawal' dialog box. The dialog has a title bar with a close button (X). The main content area contains the text 'Select a record type' followed by three radio button options: 'Regular' (which is selected), 'Single', and 'Transfer'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Next'. A mouse cursor is pointing at the 'Next' button.

Complete the details of the withdrawal:

New Withdrawal: Regular

Withdrawal Details

* Amount

* Frequency

Indexation ⓘ

* Start Date

* Holding

End Date

Cancel

Save & New

Save

New Withdrawal: Regular

Withdrawal Details

* Amount

* Frequency

Indexation ⓘ

* Holding

Cancel

Save &

--None--

Monthly

BiMonthly

Quarterly

Half Yearly

Annually

Single

New Withdrawal: Regular

Withdrawal Details

* Amount

* Frequency

Indexation ⓘ

* Start Date

Complete this field.

End Date

Save & New

Save

--None--

None

Average Weekly Earnings (AWE) 7.8%

Consumer Price Index (CPI) 6.8%

✓ Retail Price Index (RPI) 9%

Other

New Withdrawal: Regular

Withdrawal Details

* Amount: £300.00

* Frequency: Annually

Indexation: Retail Price Index (RPI) 9%

* Holding: Test Personal Pension | Fully Insured

* Start Date: 20/07/2023

End Date: 01/03/2033

Calendar: July 2023

Buttons: Cancel, Save & New, Save

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	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

Once the fields are complete, **Save**

New Withdrawal: Regular

Withdrawal Details

* Amount: £300.00

* Frequency: Annually

Indexation: Retail Price Index (RPI) 9%

* Holding: Test Personal Pension | Fully Insured

* Start Date: 20/07/2023

End Date: 01/03/2033

Buttons: Cancel, Save & New, Save

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



Search...



Holding

Test Personal Pension | Fully Insured



Withdrawal **W-000020** was created.



Client: [Test Client](#)
 Current Value: £0.00
 Current Risk Rating:

Details Underlying Assets Cash Accounts Assets Performance Charges History

Name Test Personal Pension Fully Insured		Description Generic Provider/Product Test Description	
Provider Name Test Provider	Type (Basis) Name Personal Pension (Fully Insured)	Product Name Test Personal Pension	
Status In force	Contract Reference GH78JL0PL	Valuation Type	
Start Date 05/04/2023	End Date 04/04/2033		
Remaining Term 10	Review Date 07/06/2024		
Rolling Term Basis	Last Modified Date 25/09/2023, 10:26		
Surrender/Transfer Value 100,000.00			

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

Contributions (1)							
Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	
1 C-000167	Regular	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	11/05/2023	

[View All](#)

Withdrawals (1)							
Withdrawal Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	
1 W-000020	Regular	Annually	£300.00	Retail Price Index (RPI) 9%	9.00%	20/07/2023	

[View All](#)

For further information on Holdings, see articles

[Generic Holdings - Underlying Assets](#)

[Risk Rate Holding](#)