

SCOTTISH WIDOWS PLATFORM

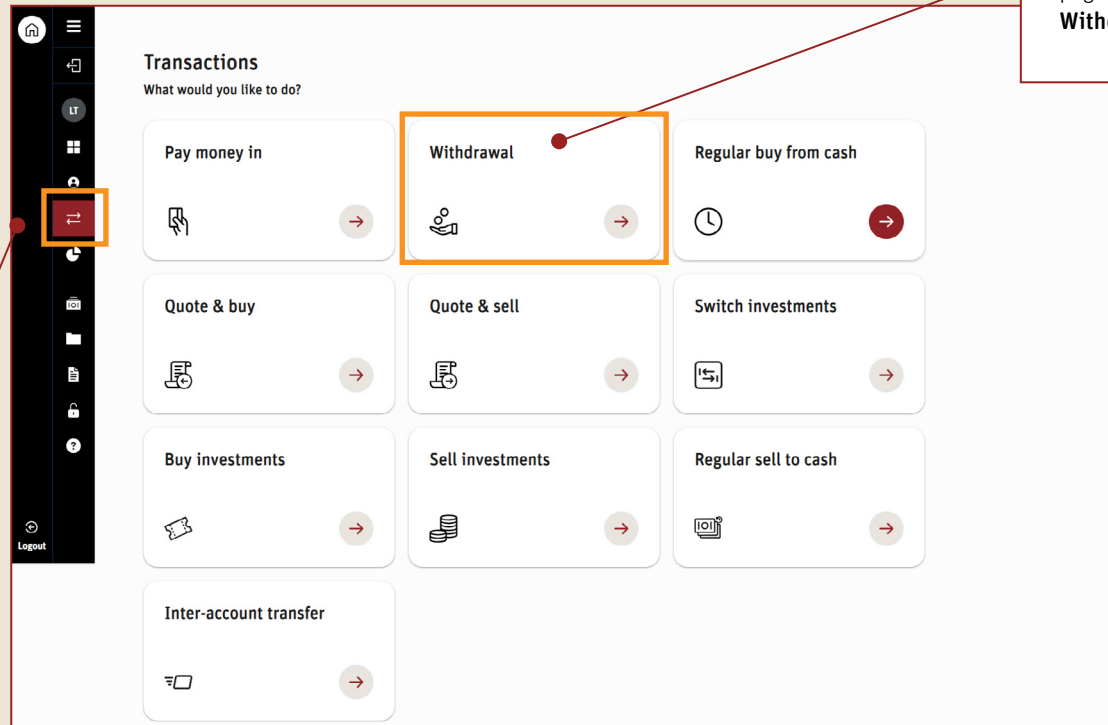
One-off withdrawal guide for clients

SCOTTISH WIDOWS

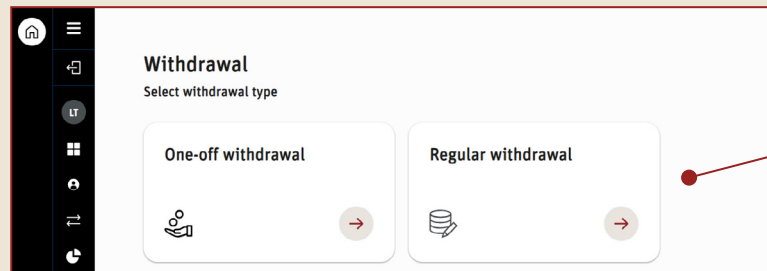


Client Dashboard

From the main navigation menu select the **Transactions** option.

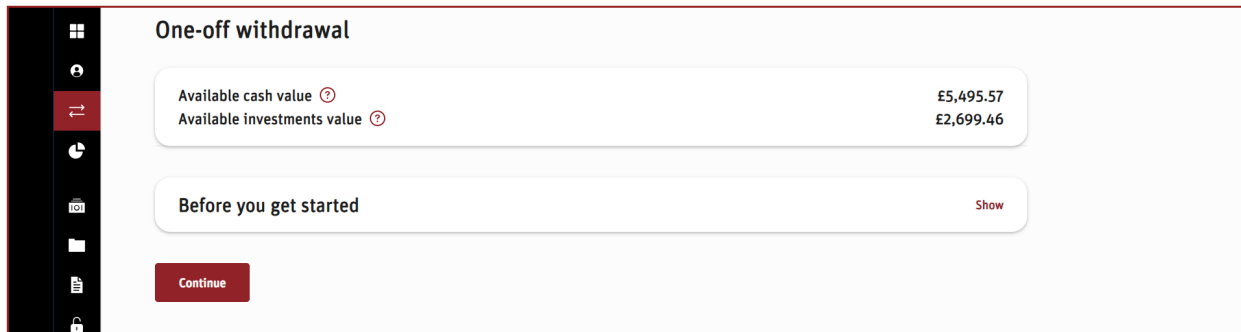


Once the Transactions page opens, click the **Withdrawal** option.



When you select withdrawal, you will be asked to choose one-off or regular withdrawal. Click the relevant tile to proceed to the withdrawal journey.

Selecting a product



Withdrawals apply to ISA and GIA products only.

Once you have selected the product you wish to withdraw from, the next screen will show you the available cash and investment value within that product. Click **Continue** to proceed.

Withdrawal amount - one-off withdrawals

One-off withdrawal
Choose how to make a withdrawal

Select withdrawal amount

How much do you want to withdraw?

£ Fixed amount

Withdraw all ?

Total withdrawal amount
Available: £8,195.03

£

Select bank account

ARN BNK
****3036 07-01-16

Logout

Select whether you're looking to withdraw a fixed amount or withdraw all.

Then select the bank account that you wish to withdraw funds to.

You must have a bank account saved. If you don't, click the **Add a bank account here** button to take you to the right page.

Selecting investments to sell

The screenshot displays a web interface for selecting investments to sell. The page title is "Select investments to sell" with a "Show filter" button. It indicates "Showing 3 of 3 results". The table below lists the investments with their details and allocation options.

Name of fund	Type	Units to sell	Allocation amount	Allocation %	
Cash	Cash	-	£500 Available: £5,495.57	100.00 %	<input type="text" value="100.00"/> % <input type="button" value="-"/>
CT FTSEAllShrTrk 2 Inc GB0008464645 0846464	Managed fund	364.17 Last known price: £4.473	£0 Available: £1,628.93	0.00 %	<input type="text" value="0.00"/> % <input type="button" value="Sell"/>
Embark Horizon Multi-Asset I Z Acc GB00BTKH4895 BTKH489	Managed fund	1,714.09 Last known price: £0.6091	£0 Available: £1,044.05	0.00 %	<input type="text" value="0.00"/> % <input type="button" value="Sell"/>

On this page, you will need to confirm your withdrawal source – cash or any available investment. Simply insert the amount next to each investment (including cash) and press sell. These will be placed in your basket, once you have finished, select **Review order** button (top right hand corner of page).


Reviewing your order

Name of fund	Type	Units to sell	Allocation amount	Allocation %	
Cash	Cash	-	£500	50.00 %	-
			Available: £5,495.57		
CT FTSEAllShrTrk 2 Inc GB0008464645 0846464	Managed fund	364.17 Last known price: £4.533	£500	50.00 %	-
			Available: £1,650.78		

On the **Review order** screen, please check the amounts to be sold and if ok, select **Continue**.

You must allocate 100% of funds before you can continue. Once you've done this, press the **Continue** button.


Confirming withdrawal



Withdrawal details

Please make sure withdrawal details are correct

Type:	One-off withdrawal
Cash amount:	£500.00
Destination:	****3036 07-01-16

 We aim to make all our payments through the 'Faster payments' system which pays out on the same day or next working day however, depending on your bank and the amount you are withdrawing, we may have to make the payment by BACS which can take longer.

if you have sold some investments to fund this withdrawal then we will send the proceeds once the cash has settled on your Scottish Widows account. This can take up to 5 working days and you can check the progress of your instructions in your dashboard.

[Confirm withdrawal](#) [Cancel withdrawal](#)

Review your order, and then click **confirm withdrawal**.



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