



## User Guide – Instruct a Regular Withdrawal

Regular withdrawals can be made from General Investment Accounts (GIAs) and ISAs monthly with payments made on the 7th, 14th, 21st or 28th of each month. Payments are made by BACS.

Where there is insufficient cleared cash on the account automated sales will be made 5 working days before the payment date.

### Step by step

- Access the account in question on the platform from either the 'Accounts' or 'Clients' buttons at the top of the page.
- Click on the button with three dots underneath Action, choose Withdraw from the drop-down options
- Select the Regular withdrawal option under Withdrawal type. You will be shown the section to apply the regular amounts
- Click the Add button in the bottom right of the screen and input the amount and chosen monthly payment date
- Select whether to allow auto disinvestments to fund the payment. Under Auto disinvest, if you select No it is the adviser's responsibility to ensure cleared cash is present or the payments will fail once cash is exhausted
- If you click Yes, disinvestment can be via the largest holding or across the account proportionally, when invested in a model select proportional under Type of sell down, for other investments this can be at the adviser's discretion
- Click Review and check the details you have entered. Once happy click the Continue button to confirm
- As long as you are outside of three days from the date (or five - where sales are needed) the payment will begin at the next monthly payment date