



Instruct a Regular Withdrawal

Regular withdrawals can be made from General Investment Accounts (GIAs) and Individual Savings Accounts (ISAs) monthly with payments made on the 1st, 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 required account on the platform either through the 'Clients' button at the top of the page or the search option on any screen and click into the relevant account
- Once in the account, click on the 'Account actions' button at the top right and select 'Withdraw'
- Select the 'Regular' withdrawal option under Withdrawal type. You will be shown the section to apply the regular amounts
- A box for the amount and payment day will automatically show to complete. Click the '+ Add withdrawal' button, if there is more than one regular withdrawal. (Please note if the client already has a regular withdrawal on the account, this will also show here)
- 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 'Submit' 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