



If you have any questions, please call our Customer Services Team on

**01382 573737**

Calls may be recorded for training and monitoring purposes.  
Lines are open 8am – 5pm Monday to Friday.



# Stocks & Shares ISA, Investment Dealing Account, General Investment Account and First Steps Account Withdrawal Form

Please complete in block capitals and black ink and return to Alliance Trust Savings Limited, PO Box 164, 8 West Marketgait, Dundee DD1 9YP. If you are wanting to make multiple withdrawals from more than one Account you will need to complete a form for each Account.

This form can be used to:

- Withdraw cash (Section 2)
- Sell investments and withdraw the proceeds (Section 3)
- Transfer investments into your own name (Section 5)
- Sell or transfer all investments and close your Stocks & Shares ISA, Investment Dealing Account, General Investment Account or First Steps Account (Section 6)

## 1. Personal details

Name:	Account Number:										
Address:	Account type:	Stocks & Shares ISA	<input type="checkbox"/>	General Investment Account	<input type="checkbox"/>						
Postcode:	Investment Dealing Account	<input type="checkbox"/>	First Steps Account	<input type="checkbox"/>							
Date of birth:  D D M M Y Y	Email:										
	Phone number:										

## 2. Cash Withdrawals

Enter the amount you would like to withdraw or write 'full balance' to withdraw all cash. Also complete Section 4. If you are closing your Account, go straight to Section 6.

I wish to withdraw the following amount from my Deposit Account: £ (minimum £100)

I wish to withdraw the following amount from my Online Dealing Account: £ (minimum £100)

If you withdraw the full balance and sell all holdings, your Account will be closed. A Deposit Account may only be closed when the entire Stocks & Shares ISA or Investment Dealing Account is closed and in this case any interest applicable will be credited (net of tax) up to the date of closure. Where an ISA or Investment Dealing Account remains open, interest is automatically credited to the Deposit Account (where applicable) in April and October. See website for current rates of interest.

## 3. Instructions of the sale

To instruct the sale of an investment in order to make a withdrawal from your Account, please complete this section. Also complete Section 4. If you are closing your Account, go straight to Section 6. Refer to the notes at the end of this section.

Investment		Number of shares or 'all'*	Subsequent income instruction
Name (including class)	ISIN/TIDM code		





## 6. Closure of your Stocks & Shares ISA or Investment Dealing Account

I wish to close my Account:

Sell all investments and send the sale proceeds to the bank account detailed in Section 4

**OR**

Transfer all my investments into my own name and send me the certificates when you receive them from the Registrar. Also send me any remaining cash held within my Account.

**OR**

Transfer the investments I have listed in Section 5 into my own name and send me the certificate when you receive it from the Registrar. Sell the remaining shares and send me the sale proceeds. Also send me any remaining cash held within my Account.

Income received after closure will be sent to you by cheque or BACS.

## 7. Sign and date

Signature:

Date: | D | D | M | M | Y | Y |

Investment Dealing Account holders please note if the Account is in joint names all joint holders must sign. Failure to do so will result in a delay to your payment.

### Joint holder 1/Trustee

Signature:

Full name: \_\_\_\_\_

Date: | D | D | M | M | Y | Y |

### Joint holder 2/Trustee

Signature:

Full name: \_\_\_\_\_

Date: | D | D | M | M | Y | Y |

### Joint holder 3/Trustee

Signature:

Full name: \_\_\_\_\_

Date: | D | D | M | M | Y | Y |

### Joint holder 4/Trustee

Signature:

Full name: \_\_\_\_\_

Date: | D | D | M | M | Y | Y |

### Alliance Trust Savings

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