

# Off-Platform Holdings - Withdrawals

Last Modified on 27/04/2022 2:52 pm BST

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

Add Withdrawals to a Holding by selecting **New**:

The screenshot displays the 'Details' tab of an Off-Platform Holding. The main area is divided into two columns. The left column contains a table with the following data:

Name	Description
Aegon One Retirement   Fully Insured	Test Holding Description

Provider Name	Type (Basis) Name	Product Name
AEGON	Personal Pension (Fully Insured)	Aegon One Retirement

Status	Contract Reference
In Force	7TH98L

The right column contains a table with the following data:

Start Date	End Date
18/03/2022	18/03/2032

Remaining Term	Review Date
10	18/03/2023

Rolling Term Basis	Last Modified Date
	18/03/2022, 13:39

Below the main details is a 'Contributions (1)' section with a table:

Contribution...	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date
C-000002	Regular	Monthly	£200.00	Retail Price Index (RPI) 7.8%	7.80%	21/03/2022

At the bottom of the contributions section is a 'Withdrawals (0)' section with a 'New' button. To the right of the main details are two charts: 'Weighting By Funds' (a donut chart showing 57.69% Vanguard LifeStrategy 60% Equity A Acc and 42.31% 7IM AAP Adventurous C Acc) and 'Performance Chart' (a line chart showing a single data point at 18/03/2022).

Select Regular, Single or Transfer:

The screenshot shows a 'New Withdrawal' dialog box. It has a title bar with 'Description', 'Remaining Term', and 'Review Date'. The main content area is titled 'New Withdrawal' and contains the text 'Select a record type' followed by three radio button options: 'Regular' (selected), 'Single', and 'Transfer'. At the bottom right of the dialog are 'Cancel' and 'Next' buttons.

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 ⓘ

✓ --None--

Monthly

BiMonthly

Quarterly

Half Yearly

Annually

Single

Cancel

Save &

## New Withdrawal: Regular

### Withdrawal Details

\* Amount

\* Frequency

Indexation ⓘ  
  
✓ --None--  
None  
Average Weekly Earnings (AWE) 3.7%  
Consumer Price Index (CPI) 5.5%  
Retail Price Index (RPI) 7.8%  
Other

\* Start Date   
End Date

Save & New Save

## New Withdrawal: Regular

### Withdrawal Details

\* Amount

\* Frequency

Indexation ⓘ

\* Start Date   
End Date

\* Holding

Cancel Save & New Save

March 2022

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	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	7	8	9	10

Today

Once the fields are complete, **Save**

## New Withdrawal: Regular

### Withdrawal Details

* Amount £300.00	* Frequency Annually
Indexation Retail Price Index (RPI) 7.8%	* Start Date 21/03/2022
* Holding Aegon One Retirement   Fully Insured	End Date 20/03/2023

Cancel Save & New Save Save

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

Name: Aegon One Retirement | Fully Insured  
Description: Test Holding Description  
Provider Name: AEGON  
Type (Basis) Name: Personal Pension (Fully Insured)  
Product Name: Aegon One Retirement  
Status: In force  
Contract Reference: 7TH98L

Start Date: 18/03/2022  
End Date: 18/03/2023  
Remaining Term: 10  
Review Date: 18/03/2023  
Rolling Term Basis  
Last Modified Date: 18/03/2022, 13:39  
Surrender/Transfer Value

**Performance Chart**  
Sum of Value vs Date (18/03/2022). View Report. As of Today at 14:19.

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

**Contributions (1)**  
1 item • Updated 10 minutes ago

Contribution...	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
1 <a href="#">C-000023</a>	Regular	Monthly	£200.00	Average Weekly Earni...	3.80%	30/03/2022	20/04/2022

[View All](#)

**Withdrawals (1)**  
1 item • Updated a minute ago

Withdrawal Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
1 <a href="#">W-000006</a>	Regular	Annually	£200.00	Average Weekly Earni...	3.80%	04/04/2022	08/05/2022

[View All](#)

Edit Delete Edit

For further information on Holdings, see article [Risk Rate Holding](#)

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