

Platform Holdings - Withdrawals

Last Modified on 27/04/2022 2:57 pm BST

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

Add withdrawals to a Holding by selecting **New**

The screenshot displays the 'Collective Retirement Account | Fully Insured' page. At the top, there are tabs for 'Risk Rate Holding', 'Review', 'Edit', and 'Delete'. Below this, client information is shown: Client (Amy Test), Holding Platform (Quilter), Current Value (£135,000.00), and Current Risk Rating. The main content area is divided into 'Details', 'Underlying Assets', 'Performance', and 'History' tabs. The 'Details' tab is active, showing fields for Name, Description, Start Date, End Date, Remaining Term, Review Date, Provider Name, Type (Basic) Name, Product Name, Status, and Contract Reference. To the right, a 'Weighting By Funds' donut chart shows 100.00% in Vanguard LifeStrategy 60% Equity A-Acc. Below the details, there is a 'Contributions (1)' table with one entry: Contribution Id C-000008, Record Type Regular, Frequency Monthly, Amount £200.00, Indexation Retail Price Inde..., Indexation... 7.80%, Start Date 28/03/2022, and End Date 01/03/2032. At the bottom, the 'Withdrawals (0)' section is visible, with a 'New' button highlighted by a mouse cursor.

Select Regular, Single or Transfer:

The 'New Withdrawal' dialog box is shown. It has a title bar with 'Description', 'Remaining Term', and 'Review Date'. The main content area contains the text 'New Withdrawal' and a prompt 'Select a record type'. Below this prompt are three radio button options: 'Regular' (which is selected), 'Single', and 'Transfer'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Next', with a mouse cursor pointing to the 'Next' button.

Complete the details of the Withdrawal:

New Withdrawal: Regular

Withdrawal Details

*Amount

*Frequency

Indexation ⓘ

*Start Date

*Holding

End Date

New Withdrawal: Regular

Withdrawal Details

*Amount

*Frequency

Indexation ⓘ

*Holding

End Date

- ✓ --None--
- Monthly
- BiMonthly
- Quarterly
- Half Yearly
- Annually
- Single

New Withdrawal: Regular

Withdrawal Details

*** Amount**

*** Frequency**

Indexation

--None--

- ✓ --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

New Withdrawal: Regular

Withdrawal Details

*** Amount**

*** Frequency**

Indexation

*** Start Date**

*** Holding**

End Date

Amount	Indexation	Indexation...	Start Date
£200.00	Retail Price Index ...	7.80%	28/03/2022

[View All](#)

Once the fields are complete, **Save**

New Withdrawal: Regular

Withdrawal Details

<p>* Amount</p> <input style="width: 90%;" type="text" value="£300.00"/>	<p>* Frequency</p> <input style="width: 90%;" type="text" value="Annually"/>
<p>Indexation</p> <input style="width: 90%;" type="text" value="Retail Price Index (RPI) 7.8%"/>	<p>* Start Date</p> <input style="width: 90%;" type="text" value="14/03/2022"/>
<p>* Holding</p> <input style="width: 90%;" type="text" value="Collective Retirement Account Fully Insured"/>	<p>End Date</p> <input style="width: 90%;" type="text" value="01/03/2032"/>

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

Details
Underlying Assets
Performance
History

Name Collective Retirement Account Fully Insured	Description Test Personal Pension Description
Provider Name Quilter	Type (Basic) Name Personal Pension (Fully Insured)
Status In force	Contract Reference 81BN90L

Start Date 28/03/2022	End Date 11/03/2032
Remaining Term 10	Review Date 15/03/2023
Rolling Term Basis	Last Modified Date 28/03/2022, 12:16
Surrender/Transfer Value	

Weighting By Funds

100.00% - Vanguard LifeStrategy 60% Equity A Acc

Performance Chart

We can't draw this chart because there is no data.

As of Today at 12:09

Weighting By Class Allocation

39.70% - Global Equities

Contributions (1)

Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
1 C-000008	Regular	Monthly	£200.00	Retail Price Inde...	7.80%	28/03/2022	01/03/2032

Withdrawals (1)

Withdrawal Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
1 W-000002	Regular	Annually	£300.00	Retail Price Index (RPI) 7.8%	7.80%	14/03/2022	01/03/2032

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

Contributions (1)

Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
1 C-000008	Regular	Monthly	£200.00	Retail Price Inde...	7.80%	28/03/2022	01/03/2032

Withdrawals (1)

Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date	
Regular	Annually	£300.00	Retail Price Index (RPI) 7.8%	7.80%	14/03/2022	01/03/2032	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block; font-size: 0.7em;"> Edit Delete </div>

