

Off-Platform Holdings - Withdrawals

Last Modified on 13/02/2024 3:35 pm GMT

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

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

Name Collective SIPP	Description Pension Plan	Start Date 04/07/2022	End Date 03/07/2033
Provider Name @SIPP Pension Trustees Ltd	Type (Basis) Name Income Drawdown	Product Name Collective SIPP	Remaining Term 10
Status In force	Contract Reference eDw34rr	Valuation Type	Review Date
			Rolling Term Basis
			Last Modified Date 21/09/2023, 13:45
			Surrender/Transfer Value

Reports View **Tabular View**

Contributions (1) 1 item • Updated 9 minutes ago ⚙️ 🗑️ New

Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	13/06/2018	16/06/2033

[View All](#)

Withdrawals (0) New

Select Regular, Single or Transfer:

Description

Remaining Term

Review Date

New Withdrawal

Select a record type

Regular

Single

Transfer

Cancel Next

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 ⓘ

* Holding

✓ --None--

Monthly

BiMonthly

Quarterly

Half Yearly

Annually

Single

Cancel

Save &

New Withdrawal: Regular

Withdrawal Details

*** Amount** ↶

*** Frequency** ↶

Indexation ⓘ

--None--

- ✓ --None--
- None
- Average Weekly Earnings (AWE) 7.8%
- Consumer Price Index (CPI) 6.8%
- Retail Price Index (RPI) 9% ⤴
- Other

*** Start Date**

End Date

New Withdrawal: Regular

Withdrawal Details

*** Amount** ↶

*** Frequency** ↶

Indexation ⓘ

*** Start Date**

*** Holding**

End Date

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

<p>* Amount ↶</p> <input type="text" value="£300.00"/>	<p>* Frequency ↶</p> <input type="text" value="Annually"/>
<p>Indexation ⓘ ↶</p> <input type="text" value="Retail Price Index (RPI) 7.8%"/>	<p>* Start Date ↶</p> <input type="text" value="21/03/2022"/>
<p>* Holding</p> <input type="text" value="Aegon One Retirement Fully Insured"/>	<p>End Date ↶</p> <input type="text" value="20/03/2023"/>

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

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

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
Surrender/Transfer Value	

57.69% - Vanguard LifeStrategy 60% Equity A Acc
42.31% - 7IM AAP Adventurous C Acc

Contributions (1) 1 item • Updated 17 minutes ago

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

Withdrawals (1) 1 item • Updated a few seconds ago

Withdrawal Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date
W-000001	Regular	Annually	£300.00	Retail Price Index (RPI) 7.8%	7.80%	21/03/2022

Performance Chart

Sum of Value

250k
200k
150k
100k
50k
0

18/03/2022

Date

View Report As of Today at 14:19

Weighting By Class Allocation

45.28% - Global Equities (ex UK)

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
C-000023	Regular	Monthly	£200.00	Average Weekly Earni...	3.80%	30/03/2022	20/04/2022

Withdrawals (1) 1 item • Updated a minute ago

Withdrawal Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
W-000006	Regular	Annually	£200.00	Average Weekly Earni...	3.80%	04/04/2022	08/05/2022

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