

Platform Holdings - Withdrawals

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

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. It includes a header with 'Risk Rate Holding', 'Review', 'Edit', and 'Delete' buttons. The main content area is divided into several sections:

- Account Details:** A table with fields for Name, Description, Start Date, End Date, Remaining Term, Review Date, Rolling Term Basis, Last Modified Date, and Surrender/Transfer Value.
- Reports View:** A section with 'Tabular View' selected, showing a table of contributions. The table has columns for Contribution ID, Record Type, Frequency, Amount, Indexation, and Start Date. A 'New' button is visible next to the table.
- Performance Chart:** A bar chart showing the sum of value over time, with a legend for '100.00% - Vanguard LifeStrategy 60% Equity A Shares Acc'.
- Weighting By Class Allocation:** A section at the bottom right.

Select Regular, Single or Transfer:

The 'New Withdrawal' dialog box is shown, prompting the user to 'Select a record type'. The options are:

- Regular
- Single
- Transfer

At the bottom right, there are 'Cancel' and 'Next' buttons.

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) 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 style="width: 90%;" type="text" value="£300.00"/>	<p>* Frequency ↶</p> <div style="border: 1px solid #ccc; padding: 2px;">Annually</div>
<p>Indexation ↶</p> <div style="border: 1px solid #ccc; padding: 2px;">Retail Price Index (RPI) 9%</div>	<p>* Start Date ↶</p> <div style="border: 1px solid #ccc; padding: 2px;">23/08/2023</div>
<p>* Holding</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> ▶ Collective Retirement Account Fully Insured ✕ </div>	<p>End Date ↶</p> <div style="border: 1px solid #ccc; padding: 2px;">15/09/2033</div>

Cancel
Save & New
Save

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

Name Collective Retirement Account Fully Insured	Description Test Personal Pension Description	Start Date 22/09/2022	End Date 21/09/2033
Provider Name Quilter	Type (Basis) Name Personal Pension (Fully Insured)	Product Name Collective Retirement Account	Remaining Term 10
Status In force	Contract Reference	Valuation Type	Rolling Term Basis
			Last Modified Date 25/09/2023, 10:00
			Surrender/Transfer Value 148,523.00



100.00% - Vanguard LifeStrategy 60% Equity A Shares Acc

Reports View **Tabular View**

Contributions (1) ⌵ ⌵ ⌵ New

1 item • Updated 6 minutes ago

Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End
1 C-000186	Regular	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	28/03/2023	01/

[View All](#)

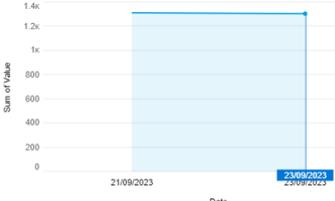
Withdrawals (1) ⌵ ⌵ ⌵ New

1 item • Updated 2 minutes ago

Withdrawal Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date
1 W-000019	Regular	Annually	£300.00	Retail Price Index (RPI) 9%	9.00%	23/08/2023

[View All](#)

Performance Chart



View Report As of Today at 10:03 ⌵

Weighting By Class Allocation



■ 40.90% - Global Equities (ex UK)
■ 22.40% - Global Bonds (ex UK)
■ 14.00% - UK Fixed Income

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

 **Contributions (1)**

1 item • Updated 6 minutes ago

  [New](#)

<input type="checkbox"/>	Contribution Id ▾	Record Type ▾	Frequency ▾	Amount ▾	Indexation ▾	Indexation... ▾	Start Date ▾	End Date ▾
1	<input type="checkbox"/> C-000166	Regular	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	28/03/2023	01/09/2023

[View All](#)

 **Withdrawals (1)**

1 item • Updated 3 minutes ago

  [New](#)

<input type="checkbox"/>	Record Type ▾	Frequency ▾	Amount ▾	Indexation ▾	Indexation... ▾	Start Date ▾	End Date ▾	
	Regular	Annually	£300.00	Retail Price Index (RPI) 9%	9.00%	23/08/2023	15/09/2023	

[Edit](#)
[Delete](#) 

[View All](#)