

# Generic Holdings - Withdrawals

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

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

Add withdrawals to a generic holding by selecting **New**:

**Holding**  
**Test Personal Pension | Fully Insured**

Client: **Test Client**    Current Value: **£0.00**    Current Risk Rating:

**Details**   Underlying Assets   Cash Accounts   Assets   Performance   Charges   History

Name: **Test Personal Pension | Fully Insured**    Description: **Generic Provider/Product Test Description**

Provider Name: **Test Provider**    Type (Basis) Name: **Personal Pension (Fully Insured)**    Product Name: **Test Personal Pension**

Status: **In force**    Contract Reference: **GH78JL0PL**    Valuation Type:

Start Date: **05/04/2023**    End Date: **04/04/2033**

Remaining Term: **10**    Review Date: **07/06/2024**

Rolling Term Basis:     Last Modified Date: **25/09/2023, 10:26**

Surrender/Transfer Value: **100,000.00**

Reports View    **Tabular View**

**Contributions (1)**   

1 item • Updated 2 minutes ago

<input type="checkbox"/>	Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
<input type="checkbox"/>	<a href="#">C-000167</a>	Regular	Monthly	£200.00	Retail Price Index (RPI) ...	9.00%	11/05/2023	12/12/2025

[View All](#)

**Withdrawals (0)**   

Select **Regular**, **Single** or **Transfer**:

**New Withdrawal**

Select a record type

Regular

Single

Transfer

  

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

Cancel

Save &

--None--

Monthly

BiMonthly

Quarterly

Half Yearly

Annually

Single

## New Withdrawal: Regular

### Withdrawal Details

\* Amount

\* Frequency

Indexation ⓘ

\* Start Date

Complete this field.

End Date

Save & New

Save

--None--

None

Average Weekly Earnings (AWE) 7.8%

Consumer Price Index (CPI) 6.8%

✓ Retail Price Index (RPI) 9%

Other

### New Withdrawal: Regular

Withdrawal Details

\* Amount: £300.00

\* Frequency: Annually

Indexation: Retail Price Index (RPI) 9%

\* Holding: Test Personal Pension | Fully Insured

\* Start Date: 20/07/2023

End Date: 01/03/2033

Calendar: July 2023

Buttons: Cancel, Save & New, Save

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	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

Once the fields are complete, **Save**

### New Withdrawal: Regular

Withdrawal Details

\* Amount: £300.00

\* Frequency: Annually

Indexation: Retail Price Index (RPI) 9%

\* Holding: Test Personal Pension | Fully Insured

\* Start Date: 20/07/2023

End Date: 01/03/2033

Buttons: Cancel, Save & New, Save

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



Search...



Holding

### Test Personal Pension | Fully Insured



Withdrawal **W-000020** was created.



Client: Test Client  
Current Value: £0.00  
Current Risk Rating:

Details Underlying Assets Cash Accounts Assets Performance Charges History

Name	Description	
Test Personal Pension   Fully Insured	Generic Provider/Product Test Description	
Provider Name	Type (Basis) Name	Product Name
Test Provider	Personal Pension (Fully Insured)	Test Personal Pension
Status	Contract Reference	Valuation Type
In force	GH78JL0PL	

  

Start Date	End Date
05/04/2023	04/04/2033
Remaining Term	Review Date
10	07/06/2024
Rolling Term Basis	Last Modified Date
	25/09/2023, 10:26
Surrender/Transfer Value	
100,000.00	

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	
1	C-000167	Regular	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	11/05/2023

  

Withdrawals (1)							
Withdrawal Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	
1	W-000020	Regular	Annually	£300.00	Retail Price Index (RPI) 9%	9.00%	20/07/2023

For further information on Holdings, see articles

[Generic Holdings - Underlying Assets](#)

[Risk Rate Holding](#)