



For customers

How to set up regular withdrawals for GIA and ISA on the Aegon Platform



How to manage regular withdrawals

This guide explains how to manage regular withdrawals from a general investment account (GIA) or ISA on the Aegon Platform.

You need to set up a regular withdrawal eight working days before the collection date you select. If there's less than seven working days, your regular withdrawal will start from the following month.

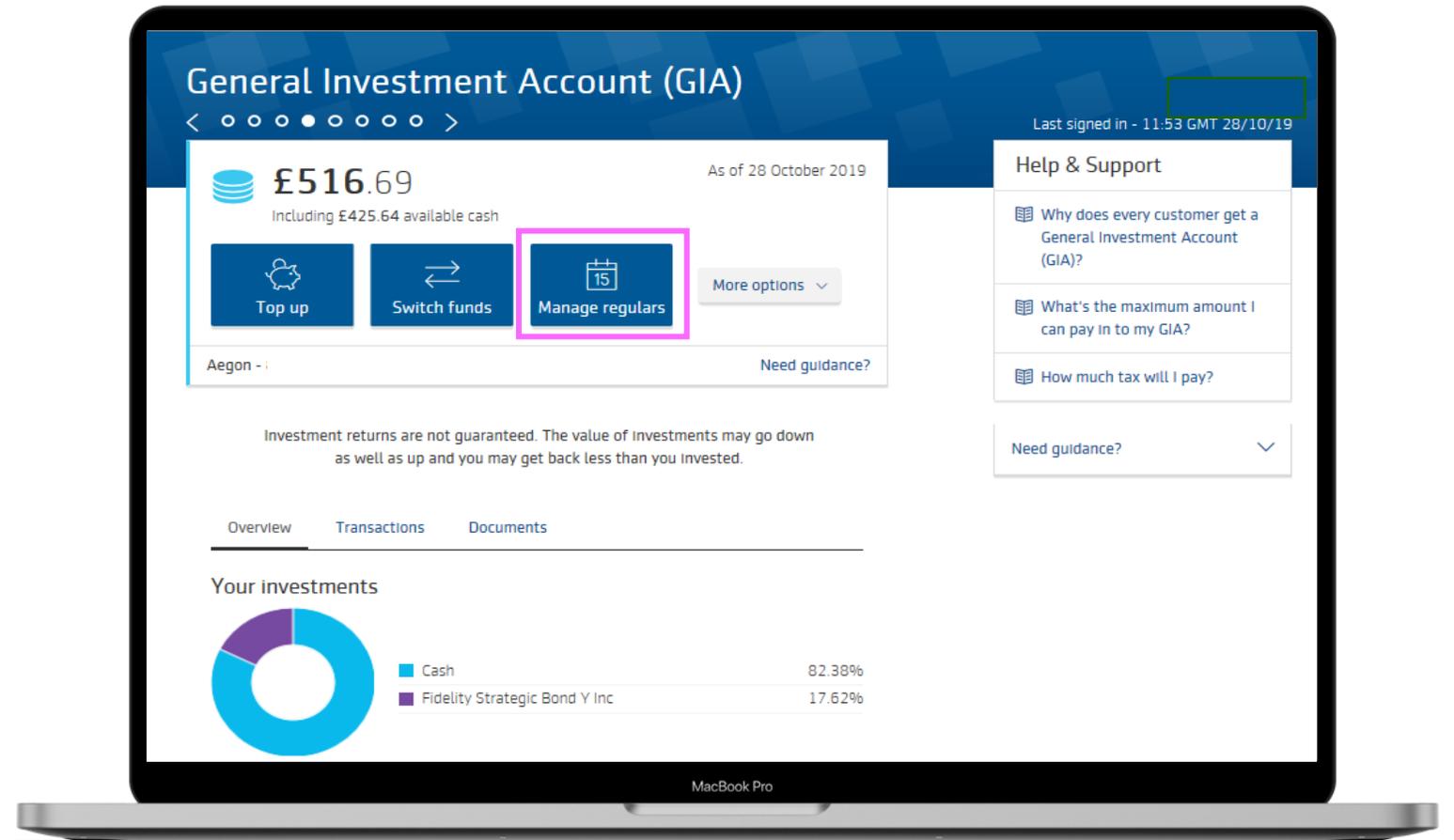
You can only complete this request online if you have transactional access.

If you have view only access to your account, you need to contact your financial adviser or intermediary.



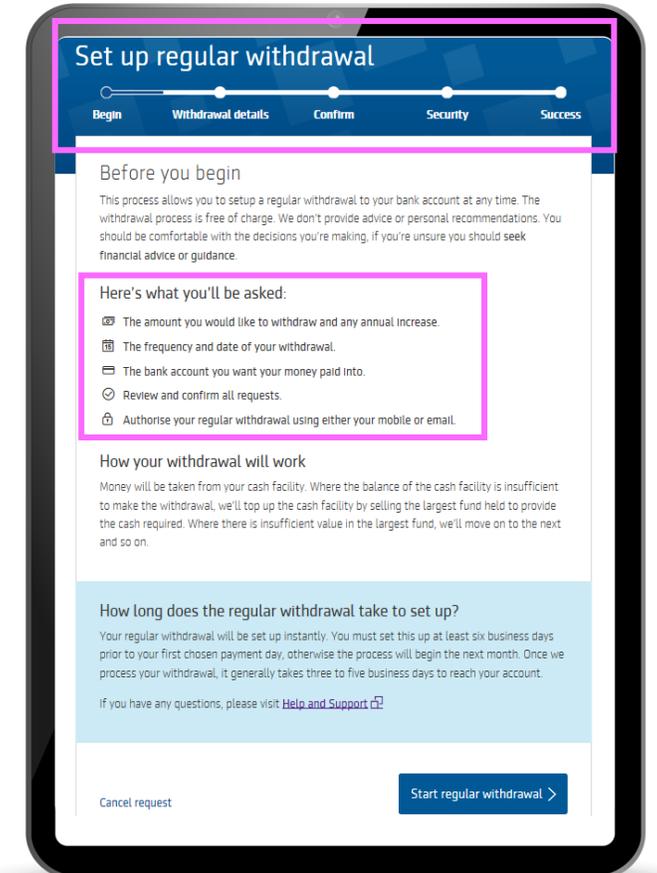
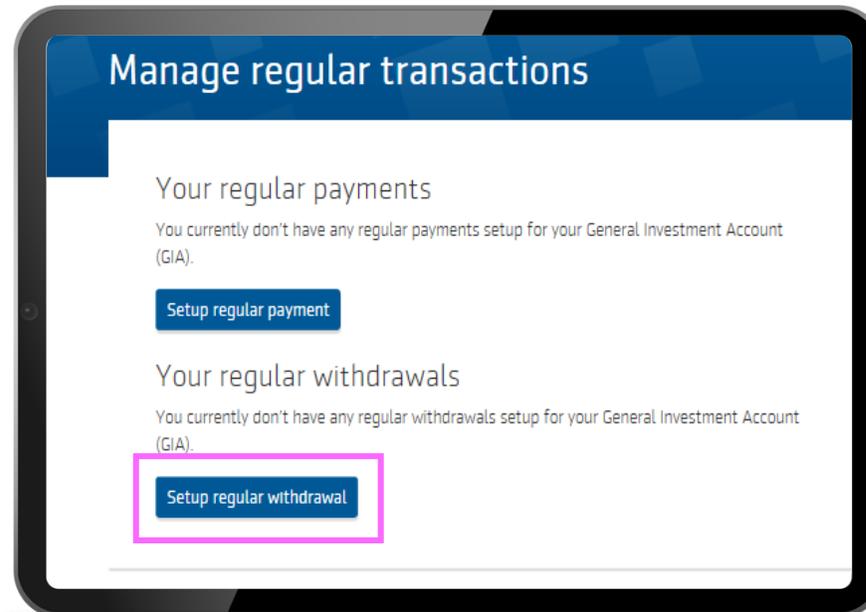
Manage regular withdrawals

- 1 Sign in to your Aegon Dashboard account.
- 2 Select the product you want to take the regular withdrawal from.
- 3 Then select **Manage regulars**.



Setting up your regular withdrawal

- 1 Select **Setup regular withdrawal**.
- 2 Along the top of the screen you can see what stage of the process you're at.
- 3 We also set out what you need to do in order to complete the process.
- 4 Select **Start regular withdrawal** to continue.



Setting up your regular withdrawal

- 1 Enter the amount you want to withdraw regularly.
- 2 Select annual increase amount.
 - None
 - Retail Price Index
 - Fixed %
- 3 Select regular payment date - 9th, 18th or 27th of the month.
This is when the payment leaves us by BACS. It will take three to five working days to reach your own account.
- 4 Select the start month from what we show.
- 5 **Select bank account** to tell us where you'd like us to make the payment to.
- 6 Select **Review and confirm** to continue.

The screenshot shows a mobile app interface for setting up a regular withdrawal. The title is 'Set up regular withdrawal'. At the top, there is a progress bar with five steps: 'Begin', 'Withdrawal details', 'Confirm', 'Security', and 'Success'. The current step is 'Withdrawal details'. The form includes the following fields and options:

- Withdrawal amount:** £ 25. Below it, it says '£516.69 available'.
- Annually increase amount:** Three buttons: 'No', 'Use Retail Price Index', and 'Fixed %'. Below these is a link: '[More about annually increasing amount](#)'.
- Withdrawal frequency:** Four buttons: 'Monthly', 'Quarterly', 'Half yearly', and 'Yearly'.
- Regular payment date:** Three buttons: '9th', '18th', and '27th'. Below these is a note: 'This is the date the withdrawal process begins. Payments may take up to 5 working days to reach your account.'
- Starting month:** Three buttons: 'November', 'December', and 'January'.
- Select bank account:** A dropdown menu with a downward arrow.
- At the bottom left, there is a link: 'Cancel request'.
- At the bottom right, there is a blue button: 'Review and confirm >'.

Completing your regular withdrawal request

The **Review and confirm** screen shows the details of your regular withdrawal request.

Double check that you're happy with everything.

The screenshot shows a mobile app interface for setting up a regular withdrawal. At the top, there's a blue header with the title 'Set up regular withdrawal' and a progress bar with five steps: 'Begin', 'Withdrawal details', 'Confirm', 'Security', and 'Success'. The 'Confirm' step is currently active. Below the header, the main content area is titled 'Review and confirm' and includes the following sections:

- Review and confirm:** A message asking the user to take time to check over their regular withdrawal amount, bank details, and fund details before confirming.
- Your monthly withdrawal:** A table with four columns: Amount, Annual increase amount, Withdrawal frequency, and First payment date. The values are: Amount: £25, Annual increase amount: No, Withdrawal frequency: Monthly, First payment date: 18/11/2019.
- Your bank details:** A table with four columns: Account number, Sort code, Building society roll number, and Account name. The values are: Account number: ****3102, Sort code: **.**.77, Building society roll number: **ST01, Account name: TEST01.
- How your withdrawal will work:** A paragraph explaining that money will be taken from the cash facility, and if insufficient, the largest fund held will be sold to provide the cash required.

At the bottom of the screen, there is an 'Edit withdrawal details' button and a 'Confirm and withdraw' button.

Confirm you give us permission to process your regular withdrawal request and then select **Confirm and withdraw** to complete your request.

The screenshot shows a mobile app interface for the 'Legal declaration' step of setting up a regular withdrawal. The screen has a white background with a blue header. The main content area is titled 'Legal declaration' and includes the following sections:

- Legal declaration:** A message asking the user to read and accept the declarations before proceeding with managing regular withdrawals on their product.
- General declaration:** A section where the user declares that they have read and understood the information and declarations, and that they agree to the terms and conditions. It includes a checkbox for 'I instruct Aegon to manage regular withdrawals on my product in accordance with this request and the Aegon Platform terms and conditions.' which is checked.

At the bottom of the screen, there is a 'Cancel request' button and a 'Confirm and withdraw >' button.



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