The smart investment platform

Processing a Withdrawal

User Guide

Overview

Processing a withdrawal payment from a GIA account is a straightforward process comprised of the following steps.

Appropriate withdrawal form completed

- Client signs **'Withdrawal Instruction – Client'**

OR

- If client has previously signed a **'Withdrawal Authority'** authorising the adviser to request withdrawals on their behalf, adviser completes **'Withdrawal Instruction – Adviser'**

Adviser uploads the completed form via the Secure Mail facility

- Novia Global carries out AML checks and verifies the instruction.
- Additional documentation may be requested to verify the signature or bank account.

Instruction processed by Novia Global Limited Client Services

- If there is not sufficient cash available in the Client's product cash facility to pay the withdrawal, Novia Global will contact the adviser to place trades online to sell down funds.
- For a full withdrawal, Novia will automatically place the trades to sell all funds.

Withdrawal paid to nominated bank account

- Payment is made once any trades have settled and sufficient cash available.
- Payment typically reaches a client bank account within 10 working days.
- A withdrawal statement will be made available within the Documents folder online.

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