

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.