

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 Europe Limited 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 Europe Limited Client Services

- If there is not sufficient cash available in the Client's product cash facility to pay the withdrawal, Novia Global Europe Limited 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.