Change of customer details

If you'd like a large print, Braille or audio CD version of this document, please contact us on 0345 604 4001 (call charges will vary) or by visiting aegon.co.uk/support

This form lets you change your personal details. If you want to change your product details please use the 'Change to product details' form.

If you want to change more than one account holder on a General Investment Account (GIA) please complete one per customer.

Please complete this form by typing in the boxes, including the signature box(es) and email it to: aegoncofundsadministration@aegon.co.uk. If your adviser has completed this form on your behalf, please check all details are correct before returning this form.

If contacting us by email, please don't include any personal, financial, or banking information as email isn't a secure method of communication. If you decide to send information in this way, you're doing so at your own risk as there's no guarantee that any email sent by you to us will be received or remain private during transmission. Where secure online journeys are available, please login to complete these.

Whenever you see this icon \boxtimes , we're asking you to send us additional material with this form. Rather than send us an original document, send us a certified copy, please see the 'Who can certify a document and how do they do it?' FAQ on our website for how to do this.

We're always here to help, so if your personal circumstances mean you need some extra support, you can also contact us to discuss the services you need using the details above.

1. Current details (as currently held by Aegon)

	•
Investor ID (this will be found on your	Old residential address
statement provided by Aegon and will start with a number)	
3	
Full forename(s)	
	Postcode
Surname	For Aegon GIA only
	Company name (if applicable)
Date of birth	Scheme name (if applicable)
Please note failure to provide these could result in a delay to your case being progressed.	Designation (if applicable)
, , , 3, 3	



2. New details

Please note failure to provide these could result in a delay to your case being progressed. You only need to complete fields where your details have changed. New name Title Mr / Mrs / Miss / Ms / Other — please specify Full forename(s)	New correspondence address All correspondence will be sent to this address if provided. Please send us certified evidence of the change of address. If your new address is overseas, please call us on 0345 604 4001 for details on what you need to send us, as we require evidence of your new address and your identity.
_	
Surname	Postcode
	We'll return any original documents you send us
Company name	as evidence to the address you provide below:
Scheme name	
National Insurance number Please update my National Insurance number. I enclose appropriate original documentation (for example a recent payslip) as confirmation.	Postcode New contact details Home phone number
	Work phone number
Enclose a certified copy of the ⊠:	
Deed poll Marriago cortificato	Mobile phone number
Marriage certificate Decree absolute of divorce	
	Email
Registered civil partnership certificate	Lindit
Company name document	Ma'll use years and above and above and
Other New client residential/company address	We'll use your email address and phone number to contact you about your product. We may also use them to keep you informed about our products and services but only where you've consented to this.
	Change of UK tax residency
Postcode	Change of UK residency status – we may need to contact you if your new address is overseas to find out where you are registered to pay tax.

3. Client declaration

To the best of my knowledge and belief, the information I've supplied in this form, is true and complete. If you're completing this as a company you must include a copy of the Certificate of Incorporation on

Change of Name. ⊠

You should sign and date this form by typing your full name in the signature box below and typing the date in the date box or by using any other electronic signature method we have agreed, in writing with your adviser, to accept. Your typed name or agreed electronic signature method in the signature box will be your signature. When you sign the form, by typing your name in this box or using the agreed electronic signature method, you are making the declarations and confirming that you wish to proceed with the instructions in this form.

Customer	Additional joint holder two
Date	Date
Print name	Print name
Signature (type name here)	Signature (type name here)
X	X X
All joint Aegon GIAs holders must also sign Additional joint holder one	Additional joint holder three
Date	Date
Print name	Print name
Signature (type name here)	Signature (type name here)
X	X

3. Client declaration — continued

For companies only			
This section should only be completed by co	ompanies.		
Date		Date	
Capacity in which declaration is made (for example owner, trustee, authorised signator		Capacity in which declaration is made (for example owner, trustee, authorised signator	у)
Primary holder signature (type name here)		Third holder signature (type name here)	
Timary notaer signature (type name nere)		Time notice signature (type name nere)	
X	X	X .	X
Date		Date	
Capacity in which declaration is made (for example owner, trustee, authorised signator		Capacity in which declaration is made (for example owner, trustee, authorised signator	у)
Second holder signature (type name here)		Fourth holder signature (type name here)	
X	x	x	X

Adviser declaration 4.

Where you have completed this form on behalf of the customer named in section 1, when you sign the form, by typing your name in this box, you are making the declarations and confirming that the customer wishes to proceed with the instructions in this form.

By signing this form, by typing your name in the box below, you make the following additional declarations:

You declare that:

- To the best of your knowledge and belief, the information supplied to Aegon on behalf of the customer is true and complete.
- You have the appropriate authority from the customer to complete this form, to make the declarations in this form on their behalf and to provide Aegon with the instructions set out in this form, acknowledging that Aegon reserves the right to request a copy of the authority and failure to provide a copy when requested may result in Aegon being unable to proceed with the instructions.

- You have discussed the form with the customer and they are aware of its content. they agree to the declarations and agree to you submitting this application on their behalf.
- You hereby indemnify Aegon against all claims, losses, tax charges, penalties and interest incurred or due to be paid by Aegon as a result of my failure to obtain the appropriate authority from the customer and/or supplying incorrect or inaccurate information and Aegon relying on and following the instructions given in this application form.

