



For financial advisers | Aegon Retirement Choices and One Retirement

# Adviser bulk transfer request

## What is this form for?

Use this form to transfer all or some of your clients to another financial adviser under the same company FCA reference number. If the new financial adviser hasn't been set up to access the platform for ARC or One Retirement, please complete the Adviser application form.

## How to complete this form

Please complete this form by typing in the boxes below. The form must be submitted by email to [clientsupport@arc.aegon.co.uk](mailto:clientsupport@arc.aegon.co.uk) by a registered firm administrator, or a FCA authorised director or partner within the firm.

Our email system and the way we deal with data internally is secure. However we're unable to ensure the security of emails before they reach us. Please consider this and do not send any personally sensitive, financial or banking information that has not been appropriately secured.

## 1 Financial adviser details

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Name of firm

Name of current financial adviser

Email or username for current financial adviser

Current and new financial adviser firm FCA number

Name of new financial adviser

Email for new financial adviser

**Please confirm below if you want to move all or some of your clients to the new financial adviser.**

- Move all clients.
- Move some clients - please attach a list giving the names and wrapper numbers for these clients.

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