



For Customers | ARC and One Retirement

# Add a Power of Attorney

If your personal circumstances mean you need any additional support, or if you'd like a large print, braille or audio version of this document, please call 03456 081 680 (call charges will vary) or visit aegon.co.uk/support

Use this form to add a Power of Attorney (POA) to an Please attach any additional documentation (see sections Aegon Retirement Choices or One Retirement account. 3 and 4), to the form and return to Aegon, Digital You can complete this form if you're the customer, the Solutions, Sunderland SR43 4DL. You must print out and attorney, a court appointed person, or a financial adviser sign the form, we cannot accept a typed signature. Any acting on their behalf. You'll need to send additional original documents will be returned once we have verified documentation along with this form - please see sections them. 3 and 4. Our email system and the way we deal with data Please tick the appropriate box below: internally is secure. However we're unable to ensure the security of emails before they reach us. Please consider I am the customer this when sending us sensitive information. I am the attorney or a court appointed person I am a financial adviser acting on behalf of the customer, attorney or court appointed person 1 Customer details 1.1 Mr/Mrs/Miss/Ms/Other - please specify 1.2 Customer number Full forename(s) 1.3 Email address Surname We'll only use your email, where appropriate, to contact you about your instruction. Details of attorney or court appointed person 2 Mr/Mrs/Miss/Ms/Other - please specify Permanent residential or company address Full forename(s)

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Postcode





## **Details of attorney or court appointed person** – continued 2

Surname		Email address
Company name - if applicable		We'll only use your email, where appropriate, to contact you about your instruction.
POA/Court order details		
Please tell us the type of attorney or court order  Lasting Powers of Attorney (LPA)  Enduring Powers of Attorney (EPA)  General or Ordinary Power of Attorney  Continuing Power of Attorney  Continuing and Welfare Power of Attorney  Court of Protection Deputy  Guardian (Scotland)  Controller (Northern Ireland)	3.4	Please tell us how we can verify your POA or Court Order  I've attached a copy of the POA with each page certified by a solicitor (registered with the Law Society), a notary public, a registered stockbroker or the donor (the customer granting the power of attorney).  I've enclosed the original POA (postal returns only I am enclosing the original Court Order document (this must be the original and sent by post)  I am enclosing a Court of Protection document (this must be the original and sent by post)
Is the attorney Individual - please go to 3.4 Joint - please go to 3.3  If you ticked 'joint' in the question above, please tell us if decisions are to be made: Jointly Joint and severally	3.5	You can view the Lasting Power of Attorney using the access code below:  V
If you are unsure please check the wording in the Power of Attorney or Court document.		

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### Identity verification 4

So that we can verify the identity of the attorney or the court appointed person, please send us certified copies of one item from Section A below, or two items - one from Section B and one from Section C for each person. These should have been issued within the last 3 months.

If the attorney/court appointed person is a current Aegon customer and has previously provided proof of identity documentation, they don't need to do so again.

In some circumstances we may also need to verify the identity of the customer - we'll let you know if we need to do this.

If you're a financial adviser acting on behalf of the customer, attorney or court appointed person, you can complete and send us the 'Power of Attorney/third party confirmation of verification of identity form' in place of sending us the required documents as listed below.

Section A
An unexpired passport
An unexpired full or provisional UK driving licence
An unexpired UK firearms certificate
An unexpired national identity card, or
An unexpired identity card issued by the electoral office of Northern Ireland.
Section B
A valid (old style) full UK driving licence
Recent evidence of entitlement to local authority-funded benefit, tax credit, pension, educational or another grant
Any correspondence from HM Revenue and Customs, addressed to the customer at the stated address
A current council tax demand letter or statement (valid for current tax year), or
Instrument of a court appointment (such as liquidator or grant of probate).
Section C
A current bank statement or credit card statement
A utility bill
A local authority rent card or tenancy agreement
A solicitor letter confirming completion of house purchase or land registration
A tenancy agreement issued by a housing association, solicitor or local council
A TV licence renewal letter
A mortgage statement, or confirmation of a government or local authority entitlement to benefit payment, tax credits, pension, educational grant etc.

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# 5 Adviser details

Firm name

FCA number

- 5.2 Where you have completed this form on behalf of the customer named in section 1 or the attorney/court appointed person named in section 2, when you sign the form, you are making the declarations and confirming that the customer/attorney/court appointed person wishes to proceed with the instructions in this form.
- **5.3** You declare that:

to the best of your knowledge and belief, the information supplied to Aegon on behalf of the customer/attorney/court appointed person is true and complete;

you have the appropriate authority from the customer/attorney/court appointed person 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/attorney/court appointed person 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/attorney/court appointed person and/or supplying incorrect or inaccurate information and Aegon relying on and following the instructions given in this application form.

Adviser signature

X

Date

D

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# 6 Declaration

To be completed by the customer, attorney or court appointed person - as applicable.

By signing this form I/we confirm that the information contained within this application is true and correct

I/We understand it is the attorney's responsibility to keep Aegon informed of any changes in circumstances relating to the Power of Attorney arrangement in place, including if the Power of Attorney or Court order is revoked.

I/We confirm that the attorney is not currently an undischarged bankrupt nor subject to a Debt Relief Order. Should this situation change at any point in the future, I/we understand that I/we must inform Aegon and that the attorney will no longer be able to act as such.

You must print and sign and date this form. By doing so you are making the declarations and confirming that you wish to proceed with the instructions in this form. We cannot accept a typed signature.

Designation - Customer/Attorney/Court appointed person

Date

D D M M Y Y Y Y

Signature

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