



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 Aegon Retirement Choices or One Retirement account. You can complete this form if you're the customer, the attorney, a court appointed person, or a financial adviser acting on their behalf. You'll need to send additional documentation along with this form - please see sections 3 and 4.

Please tick the appropriate box below:

- I am the customer
- 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

Please attach any additional documentation (see sections 3 and 4), to the form and return to Aegon, Digital Solutions, Sunderland SR43 4DL. You must print out and sign the form, we cannot accept a typed signature. Any original documents will be returned once we have verified them.

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 when sending us sensitive information.

1 Customer details

1.1 Mr/Mrs/Miss/Ms/Other - please specify

Full forename(s)

Surname

1.2 Customer number

1.3 Email address

We'll only use your email, where appropriate, to contact you about your instruction.

2 Details of attorney or court appointed person

Mr/Mrs/Miss/Ms/Other - please specify

Full forename(s)

Permanent residential or company address

2 Details of attorney or court appointed person – continued

Surname

Email address

Company name - if applicable

We'll only use your email, where appropriate, to contact you about your instruction.

3 POA/Court order details

3.1 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)

3.2 Is the attorney

- Individual - please go to 3.4
- Joint - please go to 3.3

3.3 If you ticked 'joint' in the question above, please tell us if decisions are to be made:

- Jointly
- Joint and severally

If you are unsure please check the wording in the Power of Attorney or Court document.

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)
- You can view the Lasting Power of Attorney using the access code below:

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3.5 Is the Power or Attorney to be added to your account:

- Now, or
- At a point in the future when you notify us

4 Identity verification

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.

