



For Customers | Aegon Platform

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 CD version of this document, please call 03456 044 001 (call charges will vary) or visit aegon.co.uk/support

Use this form to add a Power of Attorney (POA) to an Aegon Platform 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

Certified or original identity verification documents (see sections 3 and 4) must be sent by post to **Aegon Cofunds Administration, Sunderland SR43 4DN**. We can only accept certified identity documents by email from financial advisers.

If you're providing certified copies of the POA, you can send this by email to **aegoncofundsadministration@aegon.co.uk** or you can also post to the address opposite.

If you're sending this form by post, 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.

If you're sending the form by email, you can type in all fields including the signature box. 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.

If you're sending us a Court Order or other original documents, please attach to the form and return by post to the address above.

1 Customer details

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

Full forename(s)

Surname

1.2 Customer number

3							
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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)

Surname

Company name - if applicable

Permanent residential or company address

Postcode

Email address

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:

v														
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3.5 Is the Power of Attorney to be added to your account:

☐ Now

☐ 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 or court appointed person is a current Aegon customer and has provided certified copies of documents to prove their identity in the past, they don't need to do this 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.

5 Adviser details

5.1 Adviser name

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, by typing your name in this box, 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.

Date

D

D

M

M

Y

Y

Y

Y

Adviser signature

X

X

6 Declaration

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

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

I/We understand it is the attorney or court appointed person'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 or court appointed person 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/court appointed person will no longer be able to act as such.

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. Your typed name in the signature box will be your signature, you are making the declarations and confirming that you wish to proceed with the instructions in this form.

If you are returning this form by post, you should print the form and sign it. We cannot accept an electronic signature by post.

Designation - Customer/Attorney/Court appointed person

Date

D

D

M

M

Y

Y

Y

Y

Signature

X

X

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