

For financial advisers | Aegon Platform

## Discretionary fund manager (DFM) – adviser link request

Use this form to allow Aegon to link an adviser firm to your DFM service. Please complete this form by typing in the boxes, including the signature box(es) and email it to: apdfmsandproviders@aegon.co.uk. Please don't email any personal, financial or banking information as it's not a secure method of communication. If you have a dedicated secure email service with Aegon, for example Mailock, please use this service.

If you don't complete all sections we won't be able to process this form. We'll process your request and confirm when you can link the adviser firm to your models.

DFM name

## 1. Details of adviser firm

Adviser firm name			
Postcode			
ECA numbor			



## 2. Standard DFM fees for DFM models (if no fee applies please state 0%)

DFM model name	DFM fee (please only use % to 3 decimal paces)		

If you need additional rows, please complete this section on another form, sign and date it and send it with this form.

## 3. Declaration

We confirm the information we have provided is correct, accurate and we shall indemnify Aegon against any actions, costs, claims, damages, expenses, demands, liabilities and reasonable legal fees incurred or due to be paid by Aegon as a result of Aegon relying on the information and following the instructions given in this form.

V	×
Signature (type name in box)	
Position	
Full name	
D D M M 2 0 Y Y	
Date	

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