



For Customers | Aegon Platform

Aegon Junior ISA top up form

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 0345 604 4001 (call charges will vary) or visit aegon.co.uk/additionalsupport

In this form, 'I', 'me', 'you', 'your' or 'my' refers to the registered contact named in section 2, and 'Aegon', 'we', or 'our' refers to Cofunds Limited.

Use this form to top up an existing Aegon Junior Individual Savings Account (Aegon JISA) on behalf of a child who is under 18 and living in the UK, or if you are the child and aged between 16 and 18 and have applied to become the registered contact and your application has been accepted. The overall JISA allowance is £9,000 for the 2025/2026 tax year.

You must have been provided with an illustration, together with the Aegon JISA Key Features Document, Key Investor Information Document (KIID), (or Key Information Document), and any relevant consumer-facing sustainability disclosure report for each fund you are investing in before completing and returning this form. If you haven't we will not be able to process your request. Please go to aegon.co.uk/support to download the form **Illustration request – Aegon GIA and Aegon ISA**. We'll send you the relevant documents along with your illustration.

Please complete this form by typing in the boxes, including the signature box(es) and emailing it to: aegoncofundsadministration@aegon.co.uk

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 so please consider this and do not include any personally sensitive, financial or banking information that has not been appropriately secured.

Whenever you see this icon *, you may have to send us additional information.

1. Child details

Illustration number

1.1 Product number

8

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

Full forname(s)

Surname

Date of birth

D

D

M

M

Y

Y

Y

Y

Permanent residential address

Postcode

1.2 Please tell us:

National Insurance number - (if the child is over 16)

You should be able to find your National Insurance number on a payslip, from a P45 or P60, a letter from HM Revenue & Customs (HMRC), or a letter from the Department for Work and Pensions (DWP).

2. Registered contact details

Registered contact details

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

Full forename(s)

Surname

Date of birth

D

D

M

M

Y

Y

Y

Y

Permanent residential address

Postcode

Was advice given for this application?

Yes

No

Email address

We'll use your email address to contact you about your Aegon JISA. We might also use it to keep you informed about our products and services but only where you've given your consent to this.

3. Top-up details

3.1 The investment into the Aegon JISA will be funded by:

☐ Cheque

Amount

☐ Bank transfer

Amount

If you would like to make a bank transfer, please contact us via our support page or contact your adviser.

Important note: Please ensure for both bank transfers and cheques you give the Aegon JISA product number, or the surname and date of birth as the reference when you make the payment so we can tie it up with their account.

3.2 Third Party Details

Complete this section if you're not the child or registered contact but are funding the Aegon JISA. Aegon customer number (if applicable).

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

Full forename(s)

Surname

Date of birth

Cheques must be made payable to Aegon (we'll also accept Cofunds Ltd). For a building society cheque or banker's draft your name must appear on the front of the cheque, or on the back of the cheque accompanied by the building society's or bank's official stamp and signature.

We might need to know where the money you are investing has come from. If we do, we'll contact you to ask where the money has come from and for documentary evidence of this.

The amount you subscribe is a gift to the child and we can't repay it to the subscriber if at a later date they change their mind.

Permanent residential address

Postcode

4. Source of wealth

Your source of wealth is how you got the money to invest, for example from regular savings from your salary, selling a property or an inheritance payment. Your source of funds is the details of the bank account that your money to invest comes from.

Source of funds

Source of wealth

☐ Use the existing investment strategy.☐ Invest as set out in the table below.

Full investment manager name, fund name and share class	SEDOL code	% to be invested
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
Aegon JISA cash facility	N/A	%
Total amount	N/A	100%

☐ If you need to add additional funds, please provide the information on a separate sheet of paper in the format above, sign and date it and attach it to this form *.

☐ Use the investment choices above as my new default investment strategy for all future single payments into this product.

6. Investment income options

Please tick one of the following options:

☐ Reinvest in fund (default) – reinvest any income received back into the same fund.

☐ Leave in cash – pay any income into the Aegon JISA cash facility.

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8. Registered contact declaration

X **X**