

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

		Permanent residential address
Product number   8   Mr / Mrs / Miss / Ms / Other - please specify     Full forname(s)   Surname   Date of birth   Date of birth   Date of birth     Registered contact details	1.2	Postcode         Please tell us:         National Insurance number - (if the child is ove         You should be able to find your National Insura number on a payslip, from a P45 or P60, a lett from HM Revenue & Customs (HMRC), or a lett from the Department for Work and Pensions (DWP).
<b>Registered contact details</b> Mr / Mrs / Miss / Ms / Other – please specify		Was advice given for this application?
-		
Mr / Mrs / Miss / Ms / Other – please specify		Yes No

Postcode

## 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).

3	
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Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s

Surname

Date of birth

### 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. 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

Source of funds

Source of wealth

### 5. Investment details

In this section, you need to tell us how you'd like to invest the top up into the Aegon JISA.

Use the existing investment strategy.

Invest as set out in the table below.

The investments should match the illustration you received from us, if they don't we won't be able to process your request. If you wish to choose different investments, you'll need a new illustration.

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 \*.

The investment choices you make can be applied to all future investment choices in this product.

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

### 6. Investment income options

If you have income-generating investments, this section lets you choose how any income distributions paid from those investments should be dealt with when we receive them from the investment provider or change any existing instruction you have given us. We'll apply your selection to all income generating investments you hold within the Aegon JISA.

#### 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.

### 7. Adviser details (for adviser use only)

Adviser name		
Firm name		

If you'd like to take an ad hoc adviser charge for this transaction, or amend your client's ongoing adviser charge or service charge, use your Aegon Platform account.

### 8. Registered contact declaration

#### In this declaration:

I declare that:

- 8.1 I accept that any payment into the Aegon JISA, including subscriptions and transfers, will be placed in the appropriate cash facility. Thereafter, investments will be purchased in accordance with the investment instructions given by me in section 5 of this additional application form.
- 8.2 I am not aware of other JISA subscriptions that will result in the child named in section 1 of this additional application form exceeding the annual limit as determined by HMRC.
- 8.3 I will not knowingly make subscriptions to JISAs for the child named in section 1 of this additional application form that will result in the subscription limit being exceeded.
- 8.4 The information supplied in this application, and any supplementary forms related to it, including transactional data, is correct and complete to the best of my knowledge and belief. I am aware that it is a serious offence to knowingly provide false or misleading information on the application.

- 8.5 I have read the Aegon JISA key features, Aegon Platform terms and conditions, Aegon JISA supplement, Key Investor Information Document(s) (KIID(s)), (or Key Information Document), and any relevant consumer-facing sustainability disclosure report relating to the funds I would like to invest in. I agree that:
- 8.6 Where I have indicated in section 5 of this additional application form that I wish to set up a default investment strategy, this single payment and any future single payments to the Aegon JISA will be invested in accordance with the default investment strategy until I advise Aegon otherwise.
- 8.7 Aegon will apply my investment income instructions in accordance with section 6 of this additional application form, and where I have not provided an instruction I acknowledge that you will apply the default position, which is to reinvest the income.

# Date



Registered contact signature (type name here)



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