Regular investment strategy instruction (for third party pension products)

If you'd like a large print, Braille or audio CD version of this document, please contact us on 0345 604 4001 (call charges will vary) or by visiting **aegon.co.uk/support**

We're always here to help, so if your personal circumstances mean you need some extra support, you can also contact us to discuss the services you need using the details above.

Use this form to amend the fund selection within a regular contribution investment instruction.

This form is only to be used by clients with an existing regular contribution investment instruction within their AJ Bell Investcentre SIPP, Suffolk Life Trustees or Suffolk Life Annuities product that was set up prior to May 2018. If your client has a default investment strategy that was set up from May 2018 onwards, please use the Investment strategy instruction form which is available from the Aegon website.

This form should only be used to amend the fund choice into which the regular monthly contributions are invested.

How to complete this form:

Please complete this form by typing in the boxes, including the signature box(es) and email 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. Please consider this when sending us sensitive information.

If preferred, you can complete this form in BLOCK CAPITALS in ballpoint pen and post it to: Aegon Cofunds Administration, Sunderland SR43 4DN.

1 Customer details

Product nu	ımbe	er				_												
Mr / Mrs / Miss / Ms / Other – please specify																		
Full forena	ame(s)																
Surname																		
Date of bir	th (c	ld/n	nm/	уууу	y)													



2 Regular investment strategy instruction

2.1 Please use the investment choices shown below as the new investment strategy for regular monthly contributions into the pension product shown above. This will replace any existing regular contribution investment strategy.

Full investment manager name, fund investment and share class	SEDOL code	% to be invested
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
Product cash facility	N/A	%
Total amoun	t N/A	100%

2.2

Please tick this box if you wish to remove the existing regular contribution investment strategy from the wrapper noted in section 1. By removing the regular contribution investment strategy, regular contributions will be placed into cash unless there is a default investment strategy in place.

3 Adviser details

Adviser name

Firm name

Financial Services register number (firm)

Firm address

Postcode

3 Adviser details - continued

I, the adviser for the customer set out in section 1, instruct you to change the regular contribution investmentstrategy for the product numbered in section 1 to the investments set out in section 2 in accordance with this instruction and the Aegon Platform terms and conditions.

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. When you sign the form, by typing your name in this box, you are making the declarations and confirming that you wish to proceed with the instructions in this form.

Date (dd/mm/yyyy)

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Adviser signature (type name here)





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