



For financial advisers | Aegon Retirement Choices

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 arcdfmsandproviders@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	
	FCA number	

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

DFM model name	DFM fee (please only use % to 2 decimal places)		
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.			
Date			
Full name			
Position			
Signature (type name in box)			
V	V		

3.

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