For customers

Change of investor details

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 visit **aegon.co.uk/additionalsupport** or call 03456 081 680 (call charges will vary).

Once completed, return this form and any additional information to Aegon Digital Solutions, Sunderland, SR43 4DL.

For any Junior products, in this form, 'I', 'you', 'your' or 'my' refers to you, the Registered contact completing this form. The Registered contact is a person with parental responsibility responsible for the administration and management of the Junior product on the Child's behalf, or for a Junior Individual Savings Account (ISA) the Child aged 16 or 17, if they've successfully applied to become the Registered contact.

For Junior products the investor is the Child. If you need to update your investor details and those of your Child for whom you are the Registered contact, you will need to complete a separate form for each. If you are the Registered contact for a Junior product, the correspondence address must be the same for both.

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

Please complete in BLOCK CAPITALS and in ballpoint pen.

1. Current details (as currently held by Aegon)

Investor ID (This can be found on your statement provided by Aegon and will start with a number).

2							

If you have a joint plan (only available for Aegon Retirement Choices investors), please provide your joint investor number.

2							

Full forename(s)

Surname

Date of birth (dd/mm/yyyy)

Residential address currently held by Aegon

Postcode

Please note, failure to provide these details could result in a delay to your case being progressed.

2. Change of personal details

You only need to complete fields where investor details have changed.

New name

Title

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

Full forename(s)

Surname

Enclose a certified copy of relevant evidence of any change of name ✉:

- ☐ Deed poll
- ☐ Marriage certificate
- ☐ Decree absolute of divorce
- ☐ Registered civil partnership certificate

Other

For information on who can certify a document, go to **aegon.co.uk/certify**

National Insurance number

New residential address

Postcode

New correspondence address

All correspondence will be sent to this address, if provided.

For a Registered contact, if the address is unchanged, then leave this field blank.

Postcode

Please send us adviser certified evidence of any change of residential or correspondence address.

New contact details

Home phone number

Mobile phone number

Email (don't complete for under 16s)

Change of UK tax residency or UK relevancy status

- ☐ Change of UK residency status – enclose the relevant documentation confirming the changes ✉.
- ☐ Change of UK relevancy status – enclose the relevant documentation form confirming the changes ✉.

3. Declaration

To the best of my knowledge and belief the information I've supplied in this form is true and complete.

For any Junior product, this declaration must be signed and dated by the Registered contact.

Date (dd/mm/yyyy)

Print name

Signature

✗ ✗

Date (dd/mm/yyyy)

Print name

Signature (if applicable)

✗ ✗

If you have a joint plan (only available for Aegon Retirement Choices investors), please provide signatures of all investors.

Date (dd/mm/yyyy)

Print name

Signature (if applicable)

✗ ✗

Date (dd/mm/yyyy)

Print name

Signature (if applicable)

✗ ✗

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