

For customers

Charge deduction instruction for an ad-hoc charge

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 10 00 10 (call charges will vary).

Illustration number

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You must insert the illustration number. If you don't, we can't progress this application.

About this form

This form confirms the charges you've agreed to pay to your financial adviser and is your instruction to Aegon to facilitate the payment of these charges from your pension plan and pass them on to your financial adviser.

- Complete this form for pension plans with the following policy references:
 - IPP V10A, IPP V10B or IPP V12A for Personal Pension plans,
 - IPP FPP11, IPP FPP12 or IPP FPP12A for Flexible Pension Plans,
 - GPP V10A, GPP V12A, GPP V13A or GPP V13B for Group Personal Pension plans,
 - GSIPP V10A, GSIPP V12A, GSIPP V13A or GSIPP V13B for Group Self-invested Personal Pension plans.

You'll find this information in your policy conditions and/or plan schedule.

- We can't facilitate payment of adviser charge if the plan is:
 - invested in our New Generation With Profits funds, or
 - held in our PP1 Trust or a bespoke trust drafted by a solicitor which operates in a similar way.
- You need to complete a new Charge deduction instruction for an ad-hoc charge if you want to instruct Aegon to pay further ad-hoc adviser charges.
- If you've any questions concerning your adviser charge please speak with your financial adviser.

Please complete this form in BLOCK CAPITALS and ballpoint pen.

1. Financial adviser details

Your financial adviser's details	Financial adviser firm name
	Financial adviser network (if applicable)
	Adviser contact name
	Email address

2. Personal details

Your details	Title
	Full forename(s)
	Surname
	Date of birth
	Plan number
	Permanent home address

3. Ad-hoc adviser charge

This is a one-off payment deducted from your plan. The effective date of this charge will be the date we receive this form plus one business day.

Please give amount	£
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4. Planholder consent

In this consent, 'I' means the planholder and 'you' means Aegon.

I authorise you to deduct the adviser charge agreed with my financial adviser and facilitate the onward payment of the amount deducted to the financial adviser or network named in section 1. If the financial adviser is part of a network, you'll pay any adviser charge in accordance with the terms of the agreement in place with each network.

I acknowledge that in performing this role you'll be acting as agent for my financial adviser for the sole purpose of transferring the amount equal to the adviser charge that has to be deducted and paid to my financial adviser.

I confirm that I've received a copy of the Adviser/consultancy charges terms and conditions.

I confirm that I've received an illustration showing the impact of the charge on my plan.

Date

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Signed by planholder

X		X
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