

Cofunds Pension Account Adviser Charging Fee Model Affirmation form

This form should be used by advisers to gain their client's signed affirmation of one-off and ongoing adviser charges relating to their existing Cofunds Pension Account.

Please complete this form by typing in the boxes, including the signature box(es) and email it to: aegoncofundadministration@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.

1 Adviser Details (For adviser use only)

Adviser name	Firm name
--------------	-----------

2 Investor Details

Product number	<div>8</div>	Mr/Mrs/Ms/Miss/Other - please specify
		Full forename(s)
		Surname

3 Adviser Charging

Please note: all information entered below must be consistent with the charge your adviser will assign you.

3A. ONE-OFF

I authorise Aegon to pay my adviser a one-off advice charge of: £ or %

Please ensure sufficient cash is available in order to carry out this request.

3B. ONGOING

Charge model name

Ongoing advice charge of: £ or annual percentage rate % or tiered percentage rate %

Any ongoing advice charge will be taken monthly in arrears from the cash facility of your pension. For example, if you wish to charge £50 per month, please enter £600 as the ongoing amount. If you have selected to charge a tiered percentage rate please enter the highest applicable percentage rate that applies to the charge.

4 Declaration

I hereby affirm the agreed adviser charges set out above.

I confirm that any adviser charges are genuinely commercial arrangements between myself and my adviser and only relate to pensions advice and services provided.

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.

Client name	Signature (type name here) <input type="text"/>	Date <input type="text"/>
-------------	--	------------------------------

The Cofunds Pension Account is provided by Curtis Banks Pensions (Curtis Banks), a trading name of Suffolk Life Pensions Limited (Suffolk Life). Registered address: 153 Princes Street, Ipswich, Suffolk IP1 1QJ.

Registered in England and Wales number 1180742. Suffolk Life is authorised and regulated by the Financial Conduct Authority (FCA) under FCA registration number 0116298.

All assets held in the Cofunds Pension Account are legally owned by Suffolk Life Trustees Limited and are held on the Aegon Platform provided by Cofunds Limited (Cofunds). Registered address: Level 26, The Leadenhall Building, 122 Leadenhall Street, London, EC3V 4AB. Registered in England and Wales No. 03965289. Authorised and regulated by the Financial Conduct Authority (FCA) under FCA Registration No. 194734.