

New retirement date and lifestyle instruction

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CD version of this document, please call 03456 10 00 10 (call charges will vary) or visit aegon.co.uk/onlineform

You should complete this form if you want:

1. to change your selected retirement date.
or
2. the date your lifestyle fund is targeting to match your existing selected retirement date.

Please complete, sign and date this form on the next page and return it to us at:

Freepost RUCB-LJKR-HHBU
Aegon
Sunderland
SR43 4DU

You should only complete section 1 or 2 of this form, please don't complete both.

Full name

Scheme name (if applicable)

Plan number

Scheme number (if applicable)

1. Change your selected retirement date

If you complete this section you don't need to complete section 2.

I want my birthday to be my selected retirement date (maximum age is 75).

If you're currently paying regular contributions, do you want these to continue until your new selected retirement date?

Yes

No

You can change your contributions at any time by completing a Plan alteration form. You can find this form at aegon.co.uk/support

Traditional with-profits investments will be switched into our 'Cash' fund at your original retirement date even if you've changed your selected retirement date above. You can then complete a switch instruction to select an alternative investment choice for this fund and any future contributions.

1. Change your selected retirement date continued

You only need to complete this part of this section if you're invested in a lifestyle fund.

You're invested in a lifestyle fund which is designed to automatically change your mix of investments as you approach retirement.

Please remember, even if you're invested in this type of fund you should still review your investments on a regular basis, particularly if your financial needs or personal circumstances change. Please tick only one of the following options:

- I want the date my fund is targeting to match my new selected retirement date.
- I don't want the date my fund is targeting to match my new selected retirement date.

If you don't tick one of the options, the date your lifestyle fund is targeting won't match your new selected retirement date.

If the selected retirement date and the year your fund is targeting are different, this could result in the mix of your investments not being the most appropriate at your selected retirement date. That's why it's important you tell us if you want your fund to match the new retirement date as we'll then switch you into the appropriate version of your current lifestyle fund.

You can find more information on lifestyle funds at aegon.co.uk/lifestylefunds

2. Change the date your lifestyle fund is targeting to match your existing selected retirement date

If you complete this section you don't need to complete section 1.

- I want the date my fund is targeting to match my existing selected retirement date.

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Print name

Signature

X	X
---	---

