

Additional investment form

Use this form for additional investments only. It can be used for an existing Investment Control bond (except where the secure income option has been chosen), an Investment Bond or a Performance Bond.

You should complete this form in BLOCK CAPITALS and in ballpoint pen.

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).

1. Additional investment

Full name(s) of bondholder(s)

Bond number

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Contact phone number

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Email

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We'll only use your phone number and email address to contact you about this instruction.

In accordance with the provisions of the above numbered bonds, I want to invest an additional

£

 (minimum £500):

You can send the additional investment to us by cheque or bank transfer.

Please provide the name(s) of the fund(s) you want to invest in and the percentage of the total amount being invested that you want to allocate to each fund. It's important this totals 100%. You should indicate the percentage split required using whole percentages. You can find a list of funds, performance data and information (including charges), and the relevant fund factsheets by going to aegon.co.uk/funds and selecting 'other fund ranges'.

The minimum you can invest is £500. The minimum you can invest into any single fund is £250. Speak to a financial adviser for full details of the funds available.

Fund name(s)	%	Fund name(s)	%
Total			100%

1. Additional investment – continued

The taxation rules that may apply to your withdrawal are important and we strongly recommend you seek advice. A financial adviser will be able to help with this, if you don't have a financial adviser, you can visit moneyhelper.org.uk/choosing-a-financial-adviser to find the right one for you.

A market value reduction/adjustment, final (also known as terminal) bonus or smoothing adjustment may apply on a withdrawal from our with-profits funds. In addition, an early encashment charge/cash-in charge may apply on a withdrawal depending upon your policy version and the length of time you've been invested with us. For further information please contact us on 03456 10 00 10 or by going to aegon.co.uk/onlineform

If you want to change any existing regular withdrawals, complete the following:

The amount to be withdrawn on each regular withdrawal from the total investment with effect from the next payment date should be altered to:

- a. % a year of the original total investment
- b. £ fixed amount for each regular withdrawal. The minimum regular withdrawal is £40 a month and £100 for other frequencies.
- c. % a year of the value of the investment at withdrawal date. This option is only available on bonds taken out after 15 January 2001. The payment dates and frequency will continue as specified previously.
- d. Distribution fund and Select Distribution fund only

If you tick the box provided the full distribution amount will be withdrawn.

Full distribution amount

2. Source of wealth

By law we have to check where the money you're investing comes from.

In some cases, we may need to see documentation as proof of this. A financial adviser will be able to tell you whether this affects you.

If you need more space, you can continue on a separate sheet of paper and attach it to this form.

Give full details of how you've acquired the money you're investing.

3. Source of funds

You only need to complete this section if you're paying by a method other than personal cheque.

Give us details of the bank account that your contribution to this bond will come from.

We have to make sure that we fulfil our anti-money laundering requirements for the named holder of the bank account that the contribution comes from.

Name of bank

Branch

Account name(s)

Account number

Sort code

4. Signature

Date

D	D	M	M	2	0	Y	Y
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Signature(s) of bondholder(s)

X	X
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X	X
---	---

X	X
---	---

X	X
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5. For financial adviser use only

Did you give this bondholder advice when deciding to alter this existing policy?

Yes No

Case number

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Money laundering

Confirmation of verification of identity certificates

In order to comply with the Money Laundering, Terrorist Financing and Transfer of Funds Regulations 2017, you're required to complete a separate confirmation of verification of identity certificate for each applicant and, if different, for the person(s) paying the contribution. We won't be able to complete the processing of this application until we've received fully completed and signed confirmation of verification of identity certificates.

Beneficial owners

Where the applicant is other than a private individual (for example, a company, partnership or trust), we are required to identify the 'beneficial owner(s)', of the policies, as defined by sections 5 and 6 of the Regulation. You're

required to complete a separate confirmation of verification of identity certificate for each beneficial owner.

Attorneys/Guardians

If the application is being made on behalf of a person who can't make the application themselves because of incapacity, we need a separate confirmation of verification of identity certificate for both the attorney/guardian and also for the person on whose behalf the attorney/guardian is acting and if different, for the person making the contribution.

Politically exposed persons

We're required by the Regulations to carry out enhanced customer due diligence for customers who are 'politically exposed persons' in order to establish the source of wealth and the source of funds that are being used to pay the contribution. If you're aware that the person who is paying the contribution is a 'politically exposed person' please contact us and we'll confirm what additional information we require from you.

