

For employers, advisers and trustees only

Member Insights access request form

Report set up

Please complete the table below for each report you'd like to set up.

You can create reports for individual schemes or combine linked schemes – see the first row for an example.

Report Name (Your choice)	Scheme No. 1	No. 2	No. 3	No. 4	No. 5	No. 6	No. 7

If you've more reports to be set up, please use the supplementary sheet at the end of this form.

User access

Provide the scheme adviser and/or any named company contacts who need access.

Complete one row per user, including any reports listed on the supplementary sheet if needed.

Trustee, scheme adviser or employer	First name	Surname	Login ID (if existing user of Member Insights)	Email address

Please allow up to 48 hours from when your request is received for login IDs to be created. Login IDs will then be sent by email.

If a request is received by the 6th of the month, the scheme's data will appear in the report issued on the 13th of that same month.

Requests received after the 6th will be included in the report released on the 13th of the following month.

Examples:

- **4 August** - Data available **13 August**
- **10 August** - Data available **13 September**

Terms

In these Terms:

“**Anniversary Date**” means the date on which this agreement starts and each anniversary thereafter. “**Member Insights**” means a factual only online service provided by Aegon that you can use to assist you in managing your pension scheme with Aegon. “**You**” means the Trustee and “**We**” or “**Aegon**” mean Scottish Equitable plc.

Terms:

- Acceptance by **Aegon** of a request for Member Insights reporting is at the complete discretion of **Aegon**, which reserves the right not to accept an application without giving any reason for doing so.
- **Aegon** reserves the right to change these terms and any part of the service offered. **Aegon** will give you three months’ notice in writing of the proposed changes. If the date of the change applying is between Anniversary Dates, **You** have the right to cancel (subject to one months’ notice in writing or earlier where Aegon agrees).
- **You** may terminate the agreement by giving us not less than three months’ notice in writing. Termination will occur at the

Anniversary Date immediately following the end of the one month notice period unless Aegon otherwise agrees.

- **Aegon** reserves the right to cancel this service at any time by giving **You** three months’ notice in writing.
- **You** will keep confidential all usernames and passwords supplied to **You** by Aegon (and shall be responsible for ensuring that any users to whom such passwords and usernames are divulged by **You** keep the same confidentiality) and will not divulge the same to any third party without the prior written consent of **Aegon**. **You** will notify **Aegon** immediately on becoming aware of any breach of this obligation.
- **You** will inform **Aegon** immediately should a user cease to be authorised to access the Member Insights reporting.
- **Aegon** reserves the right to suspend or delete a user’s access rights at any time or withdraw the service from the user at any time.
- Member Insights is a factual service only and not designed to be treated as advice.

I confirm that I’ve read and understood the Member Insights Terms set out above. I confirm that I have the authority to act on behalf of
and to agree to and sign these Terms on its behalf.

Authorised signatory

Date

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Authorised signatory’s position
