

Use this form to contact us about Pensions Dashboard matches. Once completed, return this form and any additional information to the address provided on the webpage.

1. Pensions Dashboard details

[illegible][illegible]

1. Pensions Dashboard details – continued

1.5 If your pension is displayed as a full match on the Pensions Dashboard, and you have a query about the information shown, please provide your pension reference number below and use the text box on the right to tell us about your query.

Pension reference number

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We can't respond to any general queries raised through this form, but if you have a general question about your account, please visit aegon.co.uk/support

2. Tell us your work item ID(s)

If you've already contacted us about the Pensions Dashboard and have been given a work item ID(s) please tell us what they are below. If you haven't received an ID please go to section 3.

Work item ID (you will have received this via email or post)

P	D	A	S	H							
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Work item ID (you will have received this via email or post)

P	D	A	S	H							
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Work item ID (you will have received this via email or post)

P	D	A	S	H							
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Work item ID (you will have received this via email or post)

P	D	A	S	H							
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3. Customer details

3.1 Mr/Mrs/Miss/Ms/Other - please specify

Full forename(s)

Surname

Previous surname (if applicable)

Date of birth

D

D

M

M

Y

Y

Y

Y

Current residential address

Postcode

Previous residential address

Postcode

If you think it was different, please provide the address you were at when your pension was purchased on a separate sheet of paper, in the format above, sign and date it and attach it to this form.

3.2 Please tell us:

National Insurance number

You should be able to find your National Insurance number on a payslip, from a P45 or P60, or a letter from HM Revenue & Customs (HMRC).

☐ I don't have a National Insurance number

Email address

We'll use your email address to contact you about your query. We might also use it to keep you informed about our products and services but only where you've consented to this. Please see section 6 for more information.

4. What we need from you

Ignore this section if you've told us in section 1.2 the pension is not yours.

Here is a list of the documents we can accept as evidence. You need to send us 4 different items, one item from each list.

For National Insurance number we accept certified or original copies of the following:

- HMRC document (showing name, address and NINO), for most recent tax year
- Pension statement
- P45/P60 document (P60 for most recent tax year)
- HMRC downloaded letter (via HMRC website)

For date of birth we accept certified or original copies of the following:

- Unexpired (full or provisional) UK photo driving licence
- Unexpired UK firearm certificate
- Unexpired UK passport
- Birth certificate (original only)

For your name we accept the following documents:

- Birth certificate (original only)
- Marriage certificate (original only)
- Deed poll (certified or original)
- Decree absolute (certified or original)

For your address we accept certified or original copies of the following:

- Unexpired (Full or provisional) UK photo driving licence
- Recent evidence of entitlement to local authority-funded benefit, tax credit, pension, educational or other grant within the last 12 months
- Unexpired UK firearm certificate
- Current bank statement, credit card statement within the last 3 months
- Utility bill within the last 3 months (not a mobile phone bill)
- Current council tax letter or statement for the current tax year
- Unexpired national identity card or identity card

If you think the address you've provided on the dashboard is different from the address we hold, please send us evidence of both your old and new address.

Foreign language documents

Where the documents are provided in a language other than English, we must be provided with English versions. All documents must be translated in their entirety by a professional body, such as a lawyer or legal translator. The translation company must confirm in writing on the translation:

- that it's a 'true and accurate translation of the original document
- the date of the translation
- the full name and contact details of the translator or a representative of the translation company

Unless stated otherwise, documents must be dated within 3 months for validation purposes. We'll return original documents to you by Royal Mail and can't accept any responsibility for lost or missing items.

5. Who can certify documents and how do they do it?

- Accountants
- Armed forces officer
- Bank/Building society official
- Commissioner of oaths
- Councillor (local or county)
- FCA regulated person (identified using the FCA authorised persons lists)
- FCA regulated financial services adviser (for example a stockbroker or insurance broker)
- FCA regulated financial advisers
- Member of the judiciary/justice of the peace
- Job centre employee
- Member, associate or fellow of a financial services professional body
- Paralegal (certified or qualified paralegal or associate member of the institute of paralegals)
- Post office official (through the post office's certification service)
- Ministers of religion
- Member of parliament, or Scottish/Welsh/Northern Ireland assembly member
- Doctors/nurses or dentists
- Serving police officer
- Solicitor/lawyer/advocate
- Social worker
- Teacher/lecturer
- Embassy, consulate or high commission officer in the country of issue
- Government department, member of staff or official

Take the photocopied document and the original and ask the person to certify the front of each page of every copy by writing:

- For copies of **documents with a photo** 'I certify this to be a true likeness of "Your Name" and that this document is certified to be a true copy of the original seen by me.'
- For copies of **documents without a photo** 'I certify this to be a true copy of the original seen by me.'

For both types of document, they must also:

- Print their name in block capitals
- Write or stamp the name of the company they work for
- State their occupation and role within the company
- Sign their declaration
- Provide a contact telephone number
- Include the date that the certification took place - (date must be within last 3 months)

6. How we treat personal information

Here at Aegon, we're committed to protecting and respecting your privacy. We collect your personal information so that we can verify your identity, set up your plan and provide ongoing administration. We need this information to carry out our obligations and to provide you with the products and services under the terms of your contract with us. Without it, we wouldn't be able to provide you with a plan. As part of our administration process, we work with carefully selected service providers (in other words suppliers) that carry out certain functions on our behalf. We only share the appropriate level of personal information necessary to enable our suppliers to carry out their services and they need to keep the information safe and protected at all times. Our suppliers must only act on our instructions and can't use your personal information for their own purposes. The personal information we collect may be transferred to, and stored at a destination outside of the European Economic Area (EEA). This could be to other companies within the Aegon Group or to our service providers.

Where any such processing takes place, appropriate controls are in place to make sure your information is protected. We may disclose your information to licensed credit reference and/or fraud prevention agencies to help make financial or insurance proposals and claims decisions (this will be during the application or enrolment process and on an ongoing basis), for you and anyone you're linked with financially or other members of your household. Our enquiries or searches may be recorded.

You can find more information on how we use and share your personal information, including how long we keep it and details of your rights at aegon.co.uk/customer/utilities/privacy or by contacting us to request a copy. We'd like to keep you up-to-date with information about our news, products and services. If you'd like to hear more from us, please tick the relevant box below.

☐ Mail

☐ Phone

☐ SMS

☐ Email

By ticking the box(es), you're consenting to receiving marketing messages in this way from us. You can change your mind and unsubscribe at any time simply by contacting us. For more information on how to do this go to aegon.co.uk/customer/utilities/privacy We won't pass your information to other companies outside of the Aegon Group for marketing purposes.

7. Declaration

- 7.1

I understand that it is a serious offence to provide false information or identification and verification documents and could lead to prosecution with severe penalties.
- 7.2

I affirm that the information and documents I have supplied in connection with this Pensions Dashboard contact form are true and accurate.
- 7.3

I hereby indemnify Aegon against all claims, losses, tax charges, penalties and interest incurred or due to be paid by Aegon, as a result of my failure to supply correct or accurate information and Aegon relying on the information supplied and the documents provided in connection with this Pensions Dashboard contact form.

- 7.4

I am aware that Aegon may ask for further identification and verification related information, over and above that stated in Pensions Dashboard contact form.

Name

Signature

X

X

Date

D

D

M

M

2

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Y

Y