

For customers

How do I activate my Aegon Dashboard account?



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This guide explains how to activate your Aegon Dashboard account.

There are a number of ways to do this – which we cover in this guide.

Once you're ready to set up your account, carry out the following the steps.





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- Go to aegon.co.uk
- Make sure Customer is showing in the drop down above the Aegon logo.
- Select Login on the right hand side.





Request an activation code by selecting **request an activation code**. See next page.

If you've already been given an activation code, select **setup your online access**.

n Dashboard	
n in	
Email address	
Password — Forgotten Password	Safe and Secure
Sign in	Our <u>staying safe guide</u> gives you more information on how to reduce the risk of identity fraud.
p online access	
ve been given an activation code you can go ahead an setup yo access.	
	n Dashboard n in Email address Password Forgotten Password Sign in p online access ve been given an activation code you can go ahead an setup yo access.



Request an activation code

Fill out these details and submit an activation code request.

Make sure you've got your product code and customer number to hand as you'll need at least one of these to complete this form.





Signing in to your account Help with signing in

In the following pages, we'll go through each of the options one by one.

View the one that is specific to your situation.

Need help with signing in?

If you're having trouble signing in, here are some suggestions. For security reasons we aren't able to tell you the reason you can't sign in.

l've upgraded my account and forgotten my password? I had a login with Cofunds, what do I do? I had a login with Investor Portfolio Service, what do I do? I'm a brand new customer If you're not sure which option to follow or need help, please contact <u>customer services</u>.



I've upgraded my account and forgotten my password

- 1. Select **I've upgraded my account and forgotten my password** if this describes your situation.
- 2. We'll now step you through resetting your password, select **Start.**
- 3. Enter the email address you used to activate your account and select **Request** your password reset.
- 4. We'll send you an email with a link to reset your password and access your account. Page 13 covers what you need to do next.





I had a login with Cofunds, what do I do?

- 1. Select I had a login with Cofunds, what do I do? if this describes your situation.
- 2. Select **Update your account** on the page that opens.
- 3. If you have your Cofunds login details select **Start**, if not, please <u>contact us</u>.
- 4. Enter your Cofunds login details and follow the instructions to set up your new account. Page 13 covers what you need to do next.





I had a login with Investor Portfolio Service, what do I do?

- 1. Select I had a login with Investor Portfolio Service, what do I do? if this describes your situation.
- 2. Select **Update your account** on the page that opens
- 3. If you have your Cofunds login details select **Start**, if not, please <u>contact us</u>.
- 4. Enter your Cofunds login details and follow the instructions to set up your new account. Page 13 onwards covers what you need to do next.





I'm a brand new customer

- 1. Select **I'm a brand new customer** if this describes your situation.
- To activate, you'll need the 10 digit activation code we sent you, if you don't have one, please <u>contact us</u>.
- 3. Enter your:
 - Activation code
 - Surname (make sure you use a capital letter at the start), and
 - Date of birth.
- 4. Select **Next** to set up your new account. Make sure you use a capital letter at the start of your surname.









Once you've got your activation code

- 1. Enter your 10-digit activation code.
- 2. Enter your surname. Make sure you use a capital letter at the start.
- 3. Enter your date of birth.
- 4. Check the I'm not a robot box.





Now set your password

5. Create your password and select **Next**.

It needs to be a minimum of eight characters, including at least one upper case letter and at least one number.

- 6. Add a phone number.
- 7. Reconfirm your email address. This will be your username.
- 8. Create a 6-digit PIN code. You'll need this if you forget your password at a later date.
- 9. Confirm your marketing preferences.

Begin	Activation	Username	Security	Communication	Verify	
Cre	ate passwor	d				
Enter	a password which me	ets the required sec	urity strength or b	etter.		
Create	e password					
Requir	ed for security strength					
U	pper case character(s)	Mini	mum 8 characters			
	umber(s)	No s	spaces	2		
Re-ty	pe password					
Cance	l request			Next	>	
-						

Once you complete all the information you're almost done.

We'll send you an email asking you to verify your new email address. If you don't get the email in your inbox, check your junk folder as it may have gone there.

Verifying your email address

Once you receive your email:

- Select Verify your email address.
- You're now set up and ready to start using your Aegon Dashboard account.

If you have any questions or you're having difficulty completing this process, please contact our **Customer services**.

Final step to activate your secure online account

Hi Katie,

To complete the last step in the activation process, please verify your email address.

We're here to help

If you have any queries please visit our help and support.

MacBook Pro

aegon.co.uk 🕅 @aegonuk 🖬 Aegon UK

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