



For customers

How do I activate my Aegon Dashboard account?



How do I activate my Aegon Dashboard account?

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.



Contents

- 4** **Signing into your account**
 - 6 Request and Set Up**
 - 7 Request an activation code**
 - 8 Help with signing in**
 - 9 Forgotten password**
 - 10 Alternative log in details**
 - 12 Brand new customer**

- 13** **Activating your account**
 - 14 Once you've got your activation code**
 - 15 Set a password**
 - 16 Verifying your email address**

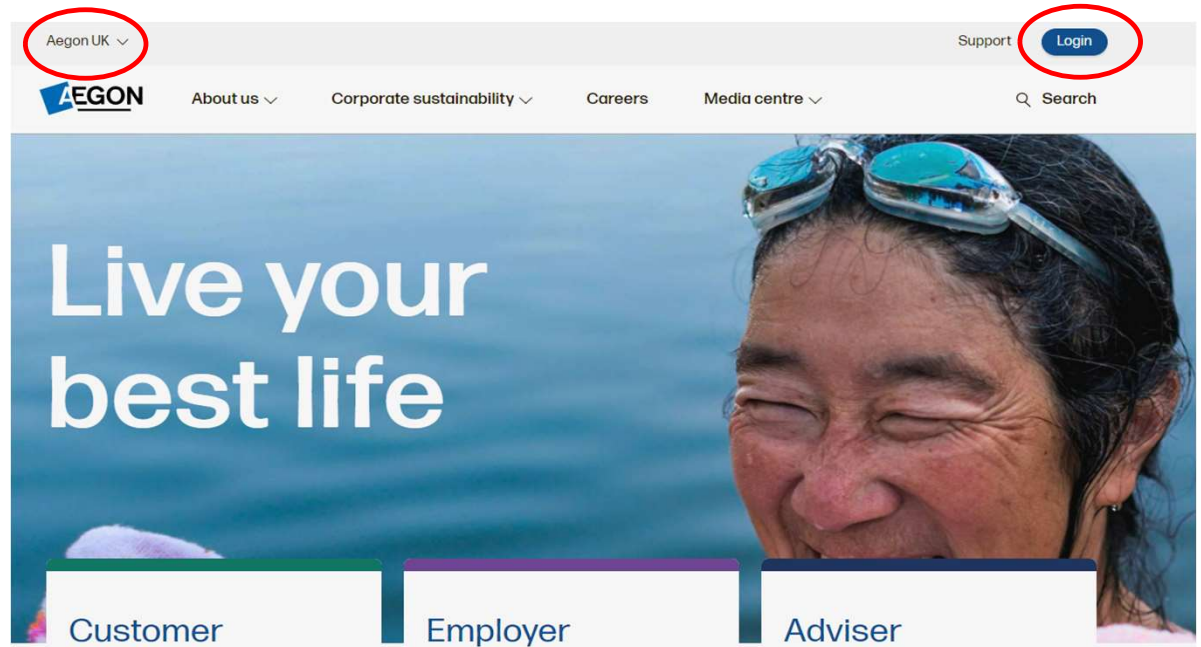


Signing into your account

Helping people achieve a lifetime of financial security

Signing in to your account

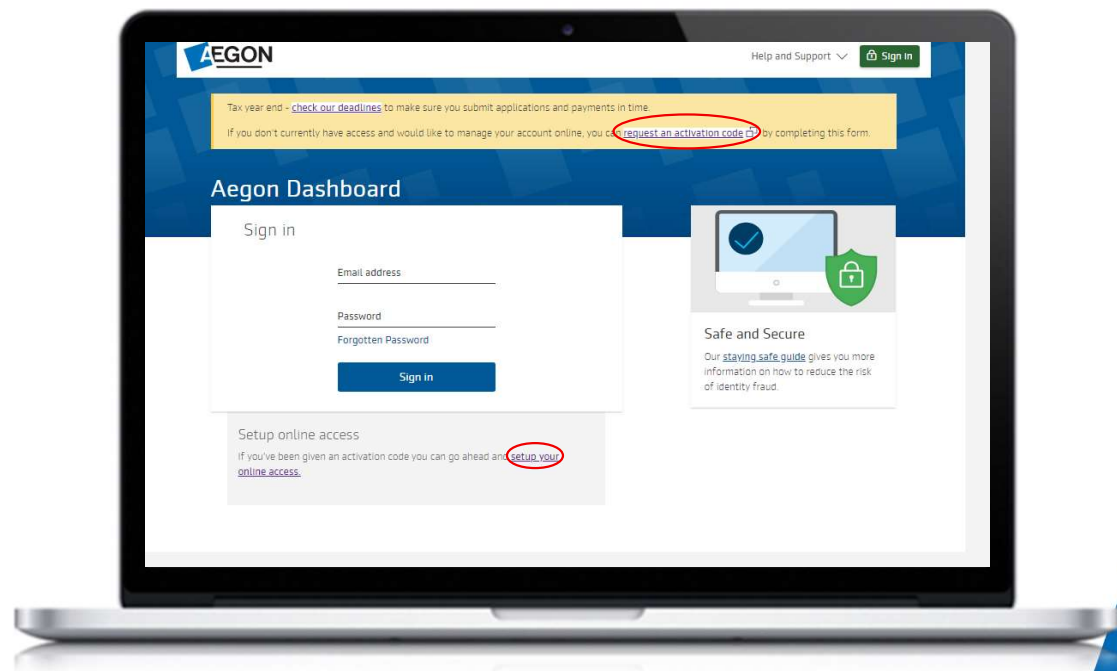
- Go to aegon.co.uk
- Make sure **Customer** is showing in the drop down above the Aegon logo.
- Select **Login** on the right hand side.



Signing in to your account

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**.

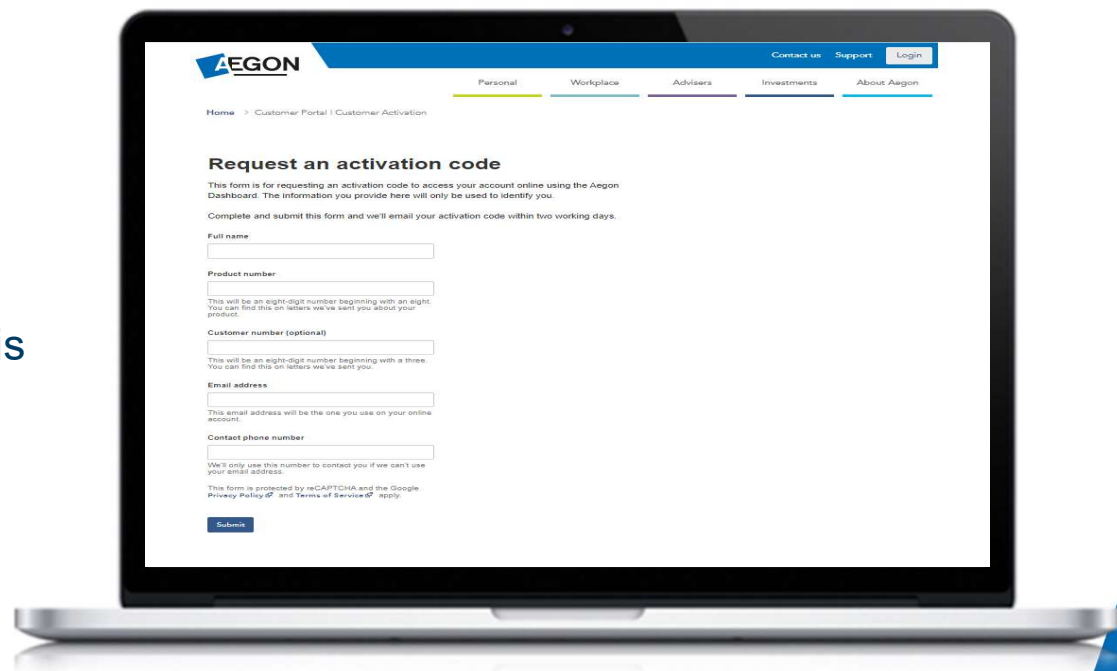


Signing in to your account

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.



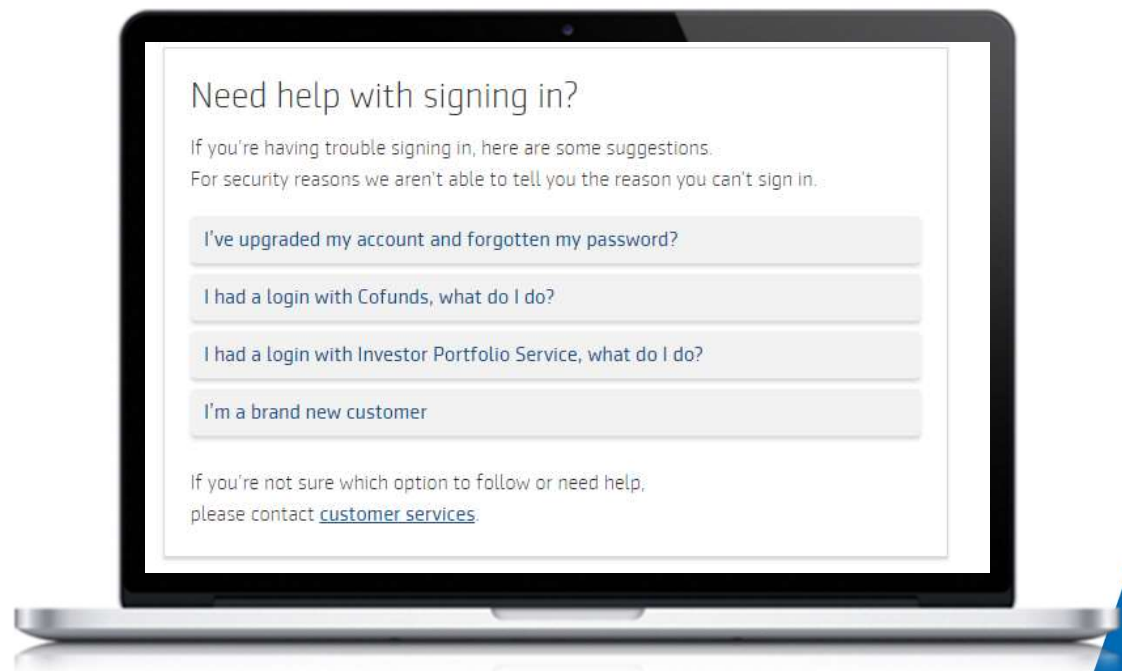
The image shows a laptop screen displaying the Aegon Customer Portal. The page title is "Request an activation code". The form includes fields for "Full name", "Product number", "Customer number (optional)", "Email address", and "Contact phone number". Each field has a text input box and a small explanatory note below it. The "Product number" note states: "This will be an eight-digit number beginning with an eight. You can find this on letters we've sent you about your product." The "Customer number (optional)" note states: "This will be an eight-digit number beginning with a three. You can find this on letters we've sent you." The "Email address" note states: "This email address will be the one you use on your online account." The "Contact phone number" note states: "We'll only use this number to contact you if we can't use your email address." At the bottom of the form is a "Submit" button. The Aegon logo is in the top left corner of the page, and navigation links for "Personal", "Workplace", "Advisers", "Investments", and "About Aegon" are in the top right. A "Login" button is also visible in the top right corner.

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.



Signing in to your account

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.

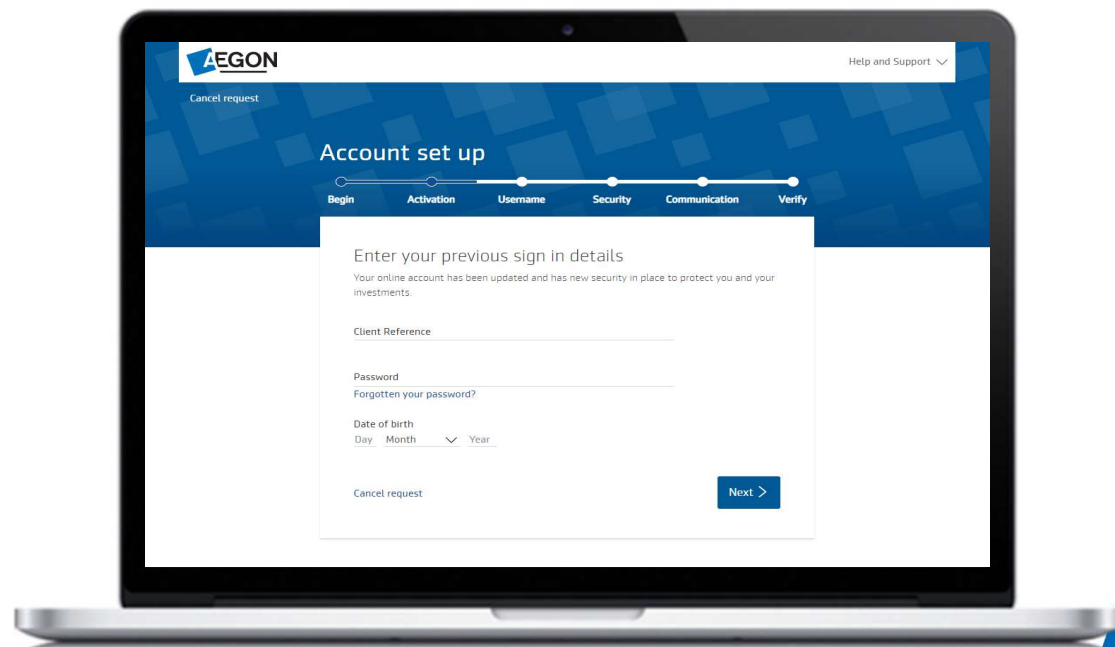
The top screenshot shows the 'Request password reset' page. It has a blue header with the title 'Request password reset' and a progress bar with three steps: 'Begin', 'Email Address', and 'Verify'. The 'Begin' step is currently active. Below the header, there is a section titled 'Before you begin' with instructions: 'Select 'Start' below to begin a two-step process to reset your password. You'll be asked to enter and verify your email address. If you're worried about your account security, please read our [staying safe guide](#).' A blue button labeled 'Start >' is on the right.

The bottom screenshot shows the 'Email Address' step of the same process. The progress bar now has 'Email Address' as the active step. The main content area is titled 'Your username' and contains the text: 'Please enter the email address you use to sign in to your dashboard. A password reset email will be sent to this address.' Below this is a text input field labeled 'Your personal email address'. A blue button labeled 'Request your password reset >' is at the bottom right.

Signing in to your account

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

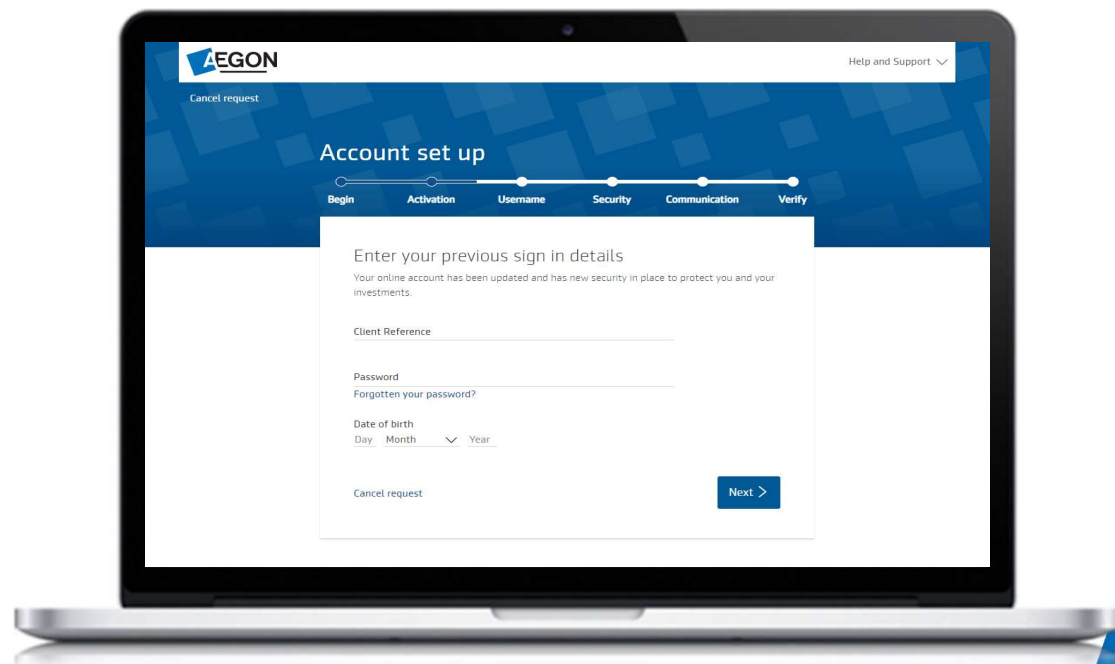
1. Select **I had a login with Cofunds, what do I do?** if this describes your situation.
2. Select **Update your account** on the page that opens.
3. If you have your Cofunds login details select **Start**, if not, please contact us.
4. Enter your Cofunds login details and follow the instructions to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



Signing in to your account

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

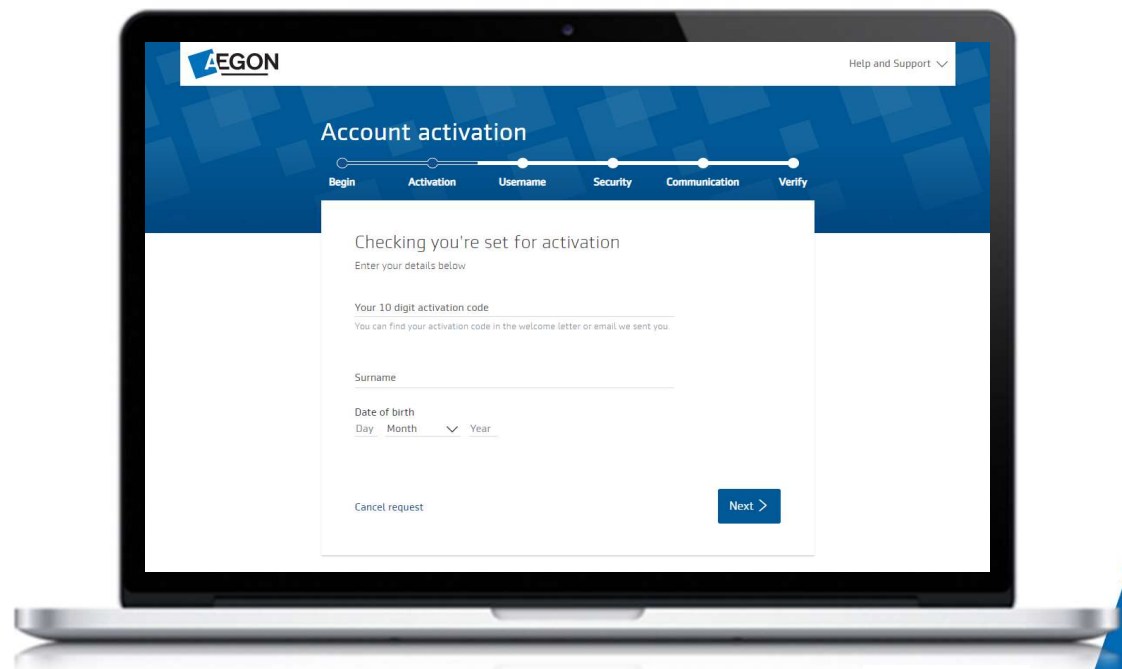
1. Select **I had a login with Investor Portfolio Service, what do I do?** if this describes your situation.
2. Select **Update your account** on the page that opens
3. If you have your Cofunds login details select **Start**, if not, please contact us.
4. Enter your Cofunds login details and follow the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



Signing in to your account

I'm a brand new customer

1. Select **I'm a brand new customer** if this describes your situation.
2. To activate, you'll need the 10 digit activation code we sent you, if you don't have one, please contact us.
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.



The background of the slide is a photograph of an elderly couple hiking on a grassy mountain trail. The man is on the left, wearing a brown jacket and a grey scarf, looking towards the right. The woman is on the right, wearing a beige jacket and a yellow scarf, looking towards the man. They are holding hands. The background shows rolling hills with autumn-colored trees under a hazy sky. A large blue triangle is overlaid on the right side of the image, containing the text.

Activating your account

Helping people achieve a lifetime of financial security

Activating your account

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.

Cancel request

Account activation

Begin Activation Username Security Communication Verify

Checking you're set for activation

Enter your details below

Your 10 digit activation code
The welcome letter or email we sent you contains your activation code

Surname

Date of birth
Day Month Year

☐ I'm not a robot

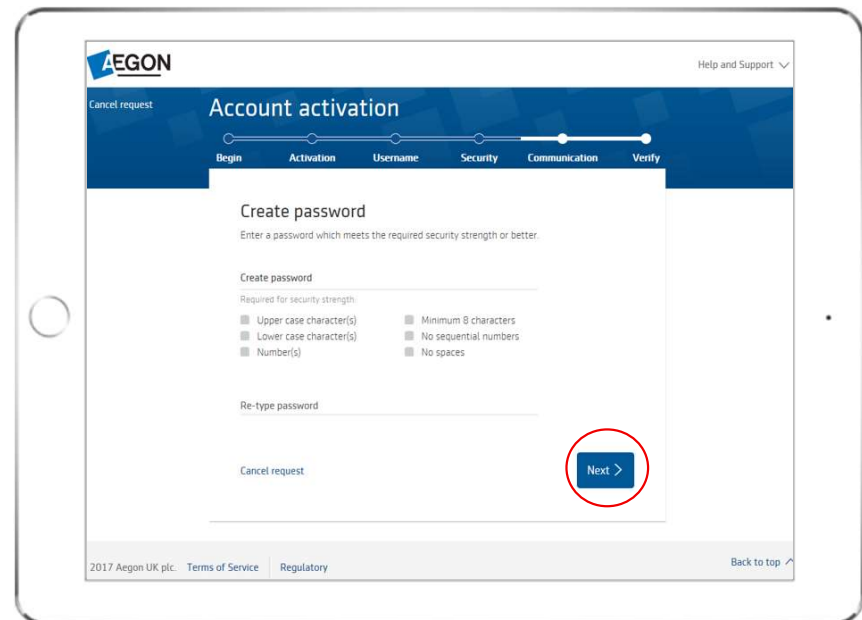
Cancel request

Next >

Activating your account

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.

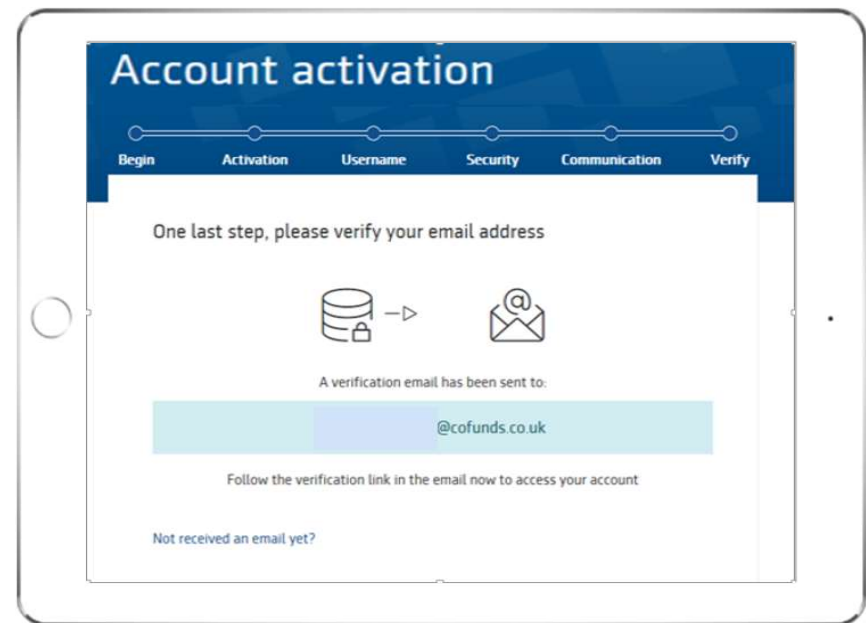


The screenshot shows the AEGON account activation process on a tablet. The screen is titled 'Account activation' and features a progress bar with steps: Begin, Activation, Username, Security, Communication, and Verify. The 'Activation' step is currently active. Below the progress bar, the 'Create password' section is displayed. It includes a text input field for the password, a list of requirements for security strength (Upper case character(s), Lower case character(s), Number(s), Minimum 8 characters, No sequential numbers, No spaces), and a 'Re-type password' field. A 'Next >' button is highlighted with a red circle. At the bottom of the screen, there is a footer with '2017 Aegon UK plc. Terms of Service Regulatory' and a 'Back to top' link.

Activating your account

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.



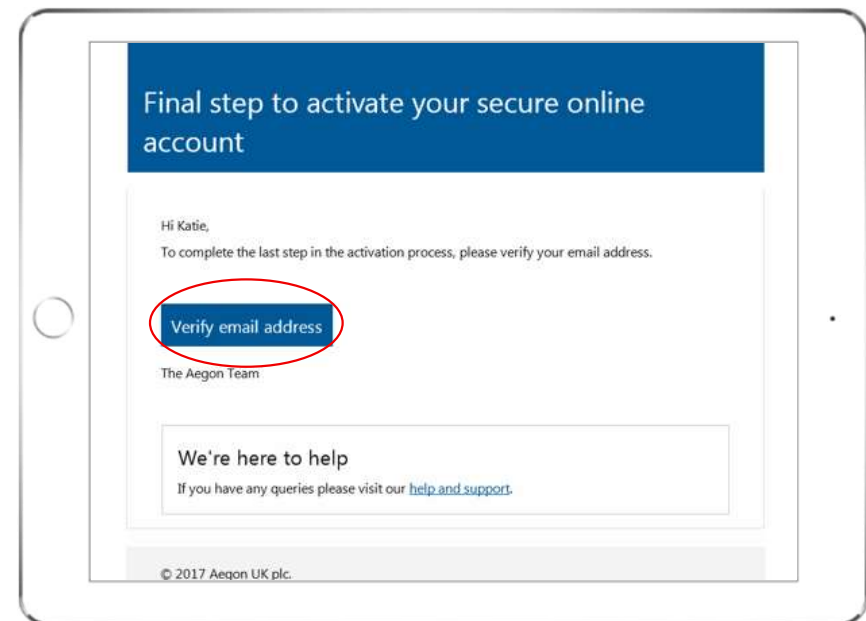
Activating your account

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](#).





aegon.co.uk



@aegonuk



Aegon UK



Aegon UK

Aegon is a brand name of both Scottish Equitable plc (No. SC144517) registered in Scotland, registered office: Edinburgh Park, Edinburgh EH12 9SE, and Cofunds Limited, Registered in England and Wales No.03965289, registered office: Level 26, The Leadenhall Building, 122 Leadenhall Street, London, EC3V 4AB. Both are Aegon companies. Scottish Equitable plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Cofunds Limited is authorised and regulated by the Financial Conduct Authority (FCA). Their FCA Financial Services Register numbers are 165548 and 194734 respectively. © 2023 Aegon UK plc

DIR386867/07/23