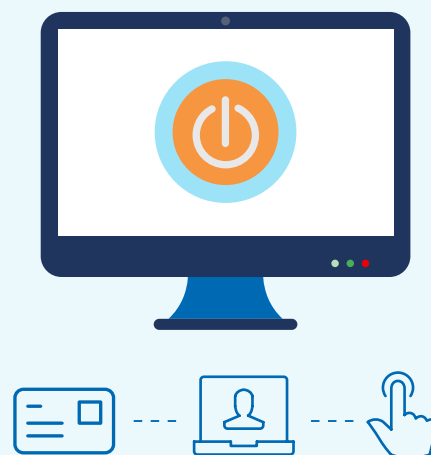


For financial advisers only

How do I... manage regular contributions online for existing clients?



This guide shows you how to manage regular contributions online on the Aegon Platform for your existing clients' general investment account (GIA) and/or ISA.



Handy hint

This guide focuses on the steps to change a regular contribution. To cancel the regular contribution, select Stop regular contribution and confirm the instruction.

Manage regular contributions online

1. From the client summary screen choose the GIA or ISA you want to manage regular contributions for and select View and manage.

Stocks & Shares ISA

£104,404.83

Includes cash of: £25.42

View and manage

Top up

Switch

Help with this product

Remaining ISA allowance: £20,000.00 - excluding any future regular contributions.

This assumes your client hasn't contributed to an ISA with another provider in this tax year.

Aegon - 80849799

2. Select Regulars tab and then Manage regulars.

Regular contribution

£100.00 each month

Collection date

25th

Next collection

25/03/2020

Account number

****4507

Sort code

*** 07

Manage regulars

3. You'll see details of the regular contribution. Select Change.
4. You can amend the Amount online. To change the monthly collection date, you'll need to **contact us**.

Monthly contribution of £260.00

Amount	£ 260.00
Minimum monthly contribution is £1.00	
Monthly collection date	25
To change the monthly collection date please contact us	



Handy hint

You can submit changes to your client's contributions at any point throughout the month.

If you submit a change close to a collection date, we'll hold onto the request and deal with it once the collection process completes. If you need to make a further change to your client's contribution during this time you'll need to **contact us**.

5. You can then confirm if you'd like to change the funds your client is invested in.

A – No change to funds

- 1A. Select No when asked if you want to change the funds.

Do you want to change the funds?

If you amend you client's fund choice or investment strategy, we'll cancel their existing direct debit instruction and set up a new one.

[Next >](#)

- 2A.** In the Regular contributions investment strategy options you can view the fund allocation but won't be able to make changes to it.

You're unable to make any changes to the funds. If you'd like to make changes, please return to the Contributions screen and update your choice.

Regular contributions investment strategy

Here you can view and manage your client's regular contributions' investment strategy.

Fund

Kames Abslut Rtrn Bd B Acc GBP	100.00%
Distribution type: Accumulation OCF/TER: 0.68%	£500.00

Do you want to make this your client's default investment strategy?

No

Yes

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B - Changing the funds

- 1B.** Select Yes when asked if you want to change the funds.

Do you want to change the funds?

Yes

No

If you amend you client's fund choice or investment strategy, we'll cancel their existing direct debit instruction and set up a new one.

Next >

- 2B.** Confirm the advice basis of the transaction and then in Regular contributions investment strategy you can view and manage the funds.

Regular contributions investment strategy

Here you can view and manage your client's regular contributions' investment strategy.

Fund

% allocation only

✓ You've allocated 100%

Kames Abslut Rtrn Bd B Acc GBP

Distribution type: Accumulation OCF/TER: 0.68%

100.00 %

£500.00

+ Add asset

+ Add cash allocation

Do you want to make this your client's default investment strategy?

No

Yes

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Next >



Handy hint

If you update your client's default investment strategy, we'll update any rebalancing requests to the new investment strategy.

If your client has rebalancing set up, we'll sell any existing funds not in the new default investment strategy at the next rebalancing date.

- 6.** On the payments screen you can review the direct debit details. If the details are correct you can select Next. You'll need to **contact us** if you want to make changes to the payment details for the direct debit.

7. You can now view the documents relating to the changes. You can choose to Download all.

Documents

Documents are in Portable Document Format (PDF)

Documents generated successfully

 Download all

Quotes

 Illustration - pre regular contributions

 Illustration - post regular contributions

Supporting documents

 Direct debit instruction

 Aegon Platform terms and conditions

 Key features

 KIIDs

 Fund factsheets

8. Complete the declaration on behalf of your client and submit the instruction.

If you have any questions speak to your usual Aegon contact or visit aegon.co.uk/adviser