



For customers

How to request a one-off withdrawal on the Aegon Platform



How to request a one-off withdrawal

This guide explains how you can request a one-off withdrawal from a product on the Aegon Platform.

It can take up to 14 working days to process your one-off withdrawal request. This time includes us selling the fund(s) and making the payment to you.

You can only complete this request online if you have transactional access and you're the **only holder on the account**.

If there's more than one account holder, please complete the [Withdrawal instruction](#) in black ink and email it to aegoncofundsadministration@aegon.co.uk or post to:

Aegon Cofunds Administration
Sunderland
SR43 4DL

If this is for Corporate/Trusts, please complete in black ink and **post only**.

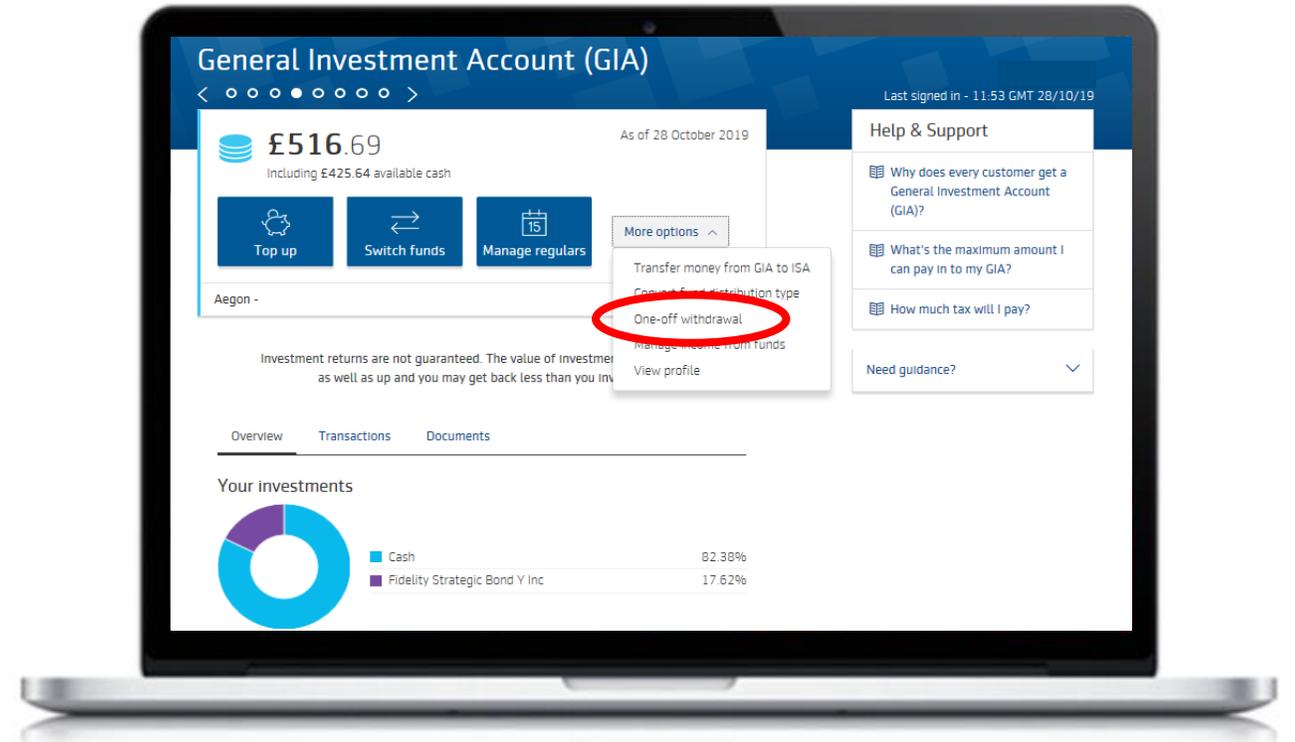
If you have view only access to your account, you need to contact your financial adviser or intermediary.

Our email system and the way we deal with data internally is secure. However, we're unable to ensure the security of emails before they reach us. Please consider this and don't include any personally sensitive, financial or banking information that hasn't been appropriately secured.

If you have access to our online services, you may be able to sign in and complete your action securely.

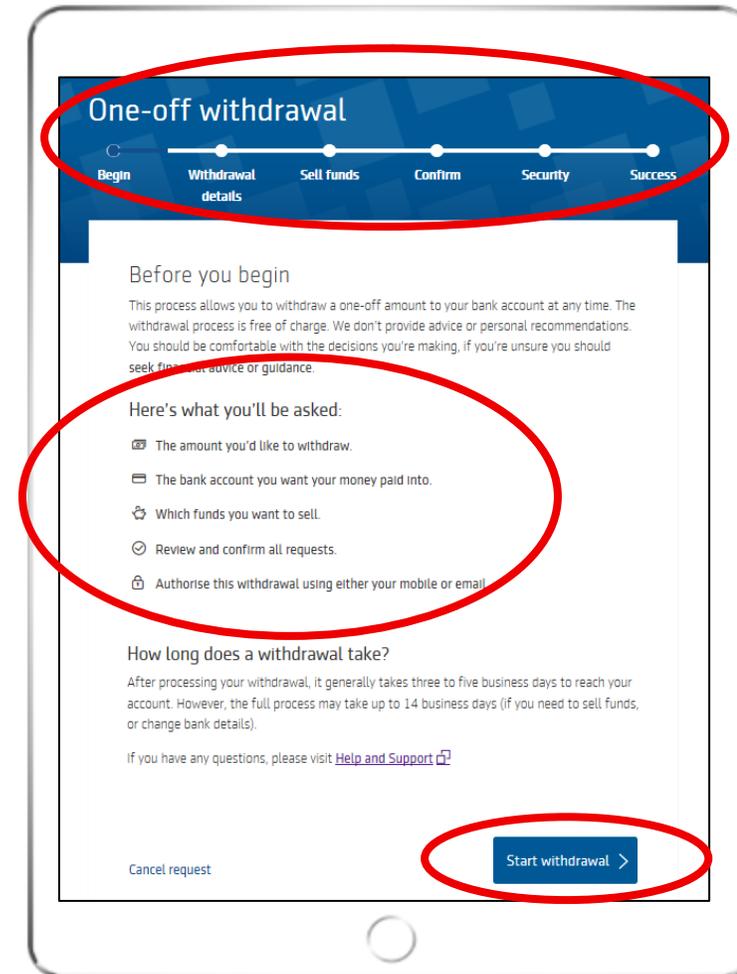
How to request a one-off withdrawal

1. Sign in to your Aegon Dashboard account.
2. Select the product you want to make the withdrawal from.
3. Select the **More options** drop down menu.
4. Then select **One-off withdrawal**.



Starting your one-off withdrawal request

1. Along the top of the screen you can see what stage of the process you're at.
2. We also set out what you need to do in order to complete the process.
3. Select **Start withdrawal** to continue.



Setting the withdrawal amount

1. Enter the amount you want to withdraw. We'll confirm if there are enough funds already in cash to cover the withdrawal.

If there's not enough cash, we'll need to sell funds to meet your required withdrawal amount.

2. **Select the option** and then **select bank account** to tell us where you'd like us to make the payment to.

3. Select **Sell funds** to continue.

The screenshot shows a mobile app interface for a 'One-off withdrawal'. At the top, a progress bar indicates the current step is 'Withdrawal details', with other steps being 'Begin', 'Sell funds', 'Confirm', 'Security', and 'Success'. The main content area is titled 'Withdrawal details' and shows the following information:

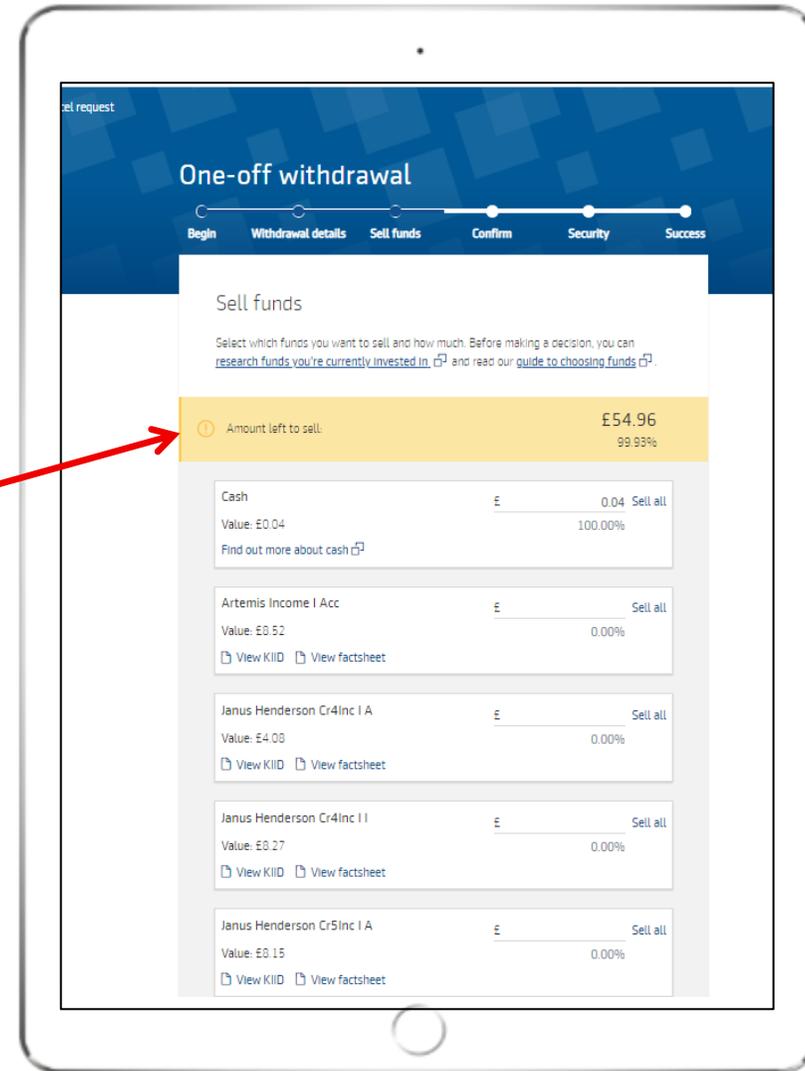
Amount to withdraw	
£ 55	
Available balance:	£61.62
Cash balance:	£0.04
Fund balance:	£61.58

Below this, a light blue box contains the text: 'Your cash balance will only cover £0.04 of your withdrawal, how would you like to split the remaining £54.96?'. There are two radio button options: 'Choose funds to sell' (which is selected) and 'Use current portfolio split'. Below the options, it says 'The amount may change by the time the withdrawal is processed.' At the bottom, there is a 'Select bank account' dropdown menu showing '**-**-57 ****0055' and a 'Cancel request' link. A blue button labeled 'Sell funds >' is located at the bottom right of the screen.

Selecting funds to sell down

You can choose to **Sell all** of a fund or give a monetary amount.

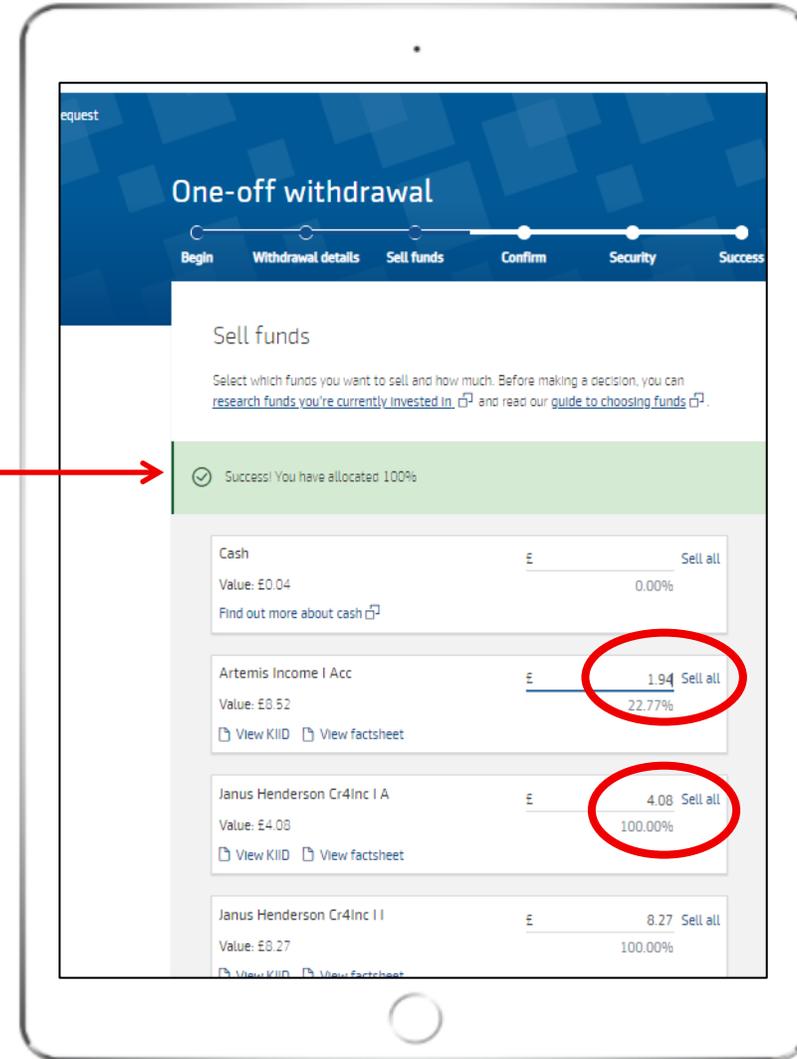
The band at the top will show how much you still need to allocate.



Fund options

The yellow banner will turn green once you have allocated 100% of the targeted amount.

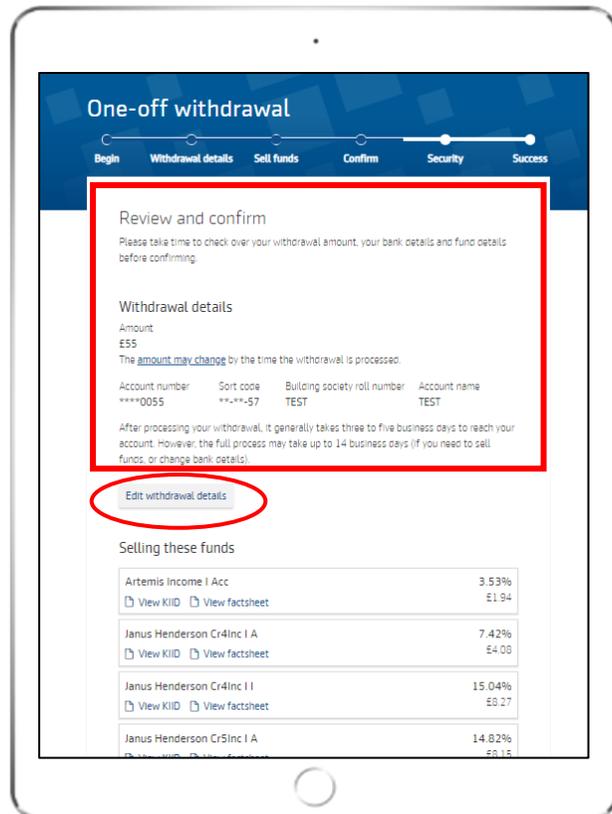
You can select to **Sell all** or you can enter a monetary amount



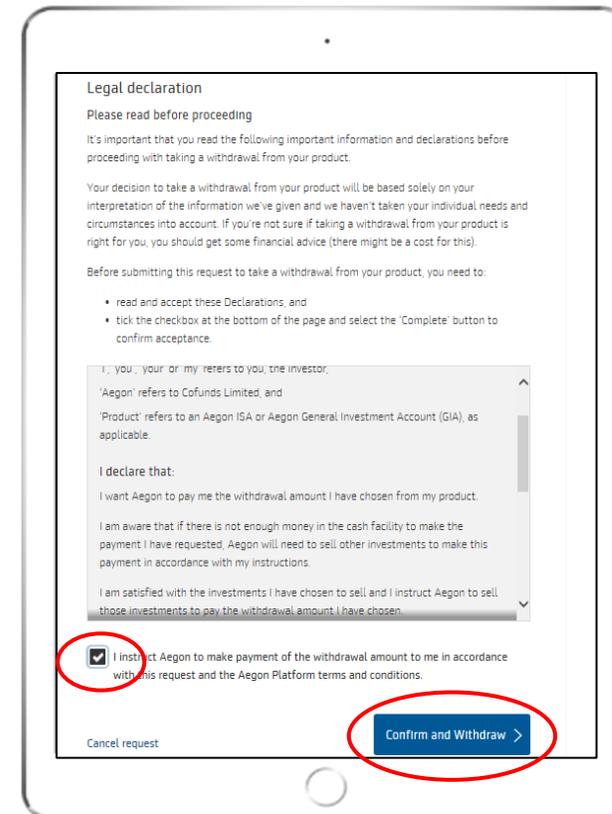
Completing the process

The **Review and confirm** screen shows the details of your one-off withdrawal.

Double check that you're happy with everything.



Confirm you give us permission to process your one-off withdrawal request and then select **Confirm and withdraw** to complete your request.





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Aegon UK



Aegon UK

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