

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 <u>Withdrawal instruction</u> in black ink and email it to <u>aegoncofundsadministration@aegon.co.uk</u> 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

 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.

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# 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.

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# **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

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### 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.

Legal declaration	
Please read before proceeding	
It's important that you read the following important information and de proceeding with taking a withdrawal from your product.	eclarations before
Your decision to take a withdrawal from your product will be based sole interpretation of the information we've given and we haven t taken you circumstances into account. If you're not sure if taking a withdrawal fro right for you, you should get some financial advice (there might be a co	ely on your r individual needs and im your product is st for this).
Before submitting this request to take a withdrawal from your product,	you need to:
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I, you, your or my refers to you, the investor,	
'Aegon' refers to Cofunds Limited, and	^
'Product' refers to an Aegon ISA or Aegon General Investment Accou applicable.	int (GIA), as
I declare that:	
I want Aegon to pay me the withdrawal amount I have chosen from r	my product.
I am aware that if there is not enough money in the cash facility to n payment I have requested, Aegon will need to sell other investments payment in accordance with my instructions.	nake the s to make this
I am satisfied with the investments I have chosen to sell and I instruct those investments to pay the withdrawal amount I have chosen.	ct Aegon to sell
I instruct Aegon to make payment of the withdrawal amount to with this request and the Aegon Platform terms and conditions.	me in accordance
Cancel request Confirm	n and Withdraw >

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