



For customers

How to switch funds on the Aegon Platform



How to switch funds

This guide explains how to switch funds on the Aegon Platform.

Depending on the fund(s) it can take up to nine days to process your switch request. This time includes us selling the fund(s).

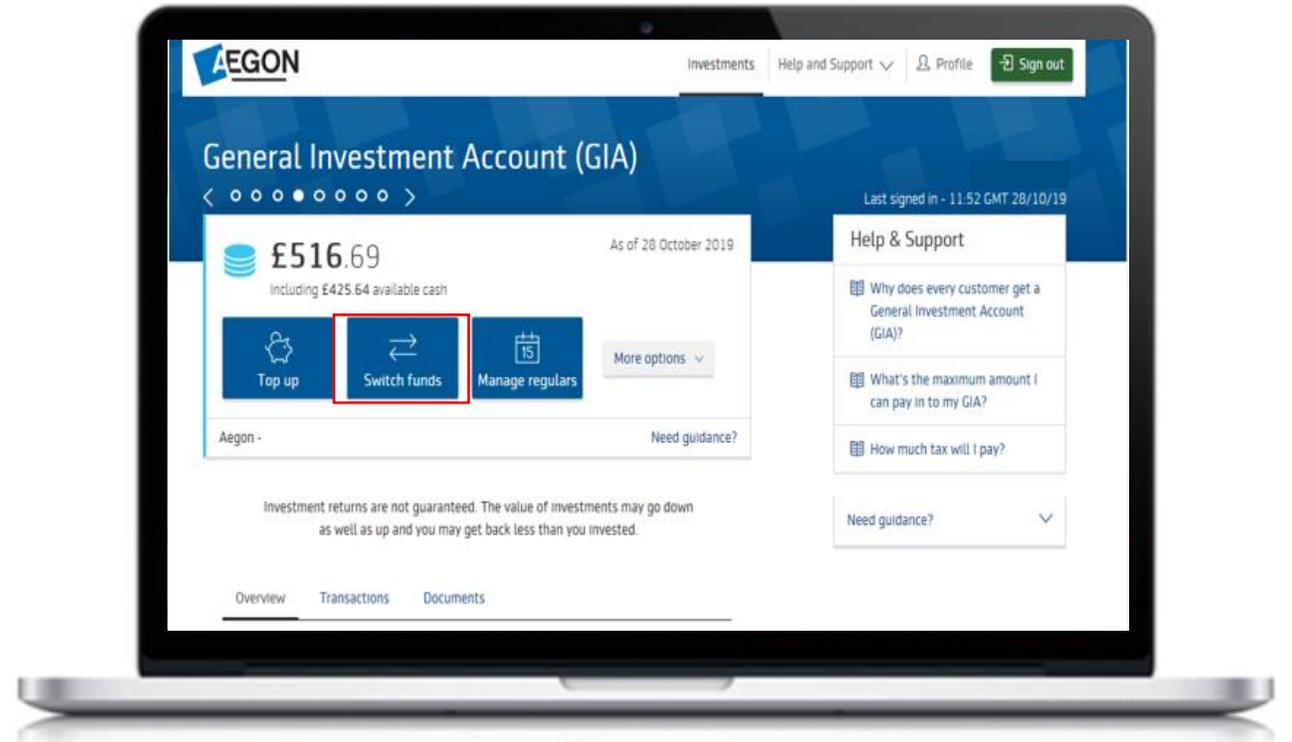
You can only complete this request online if you have transactional access.

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



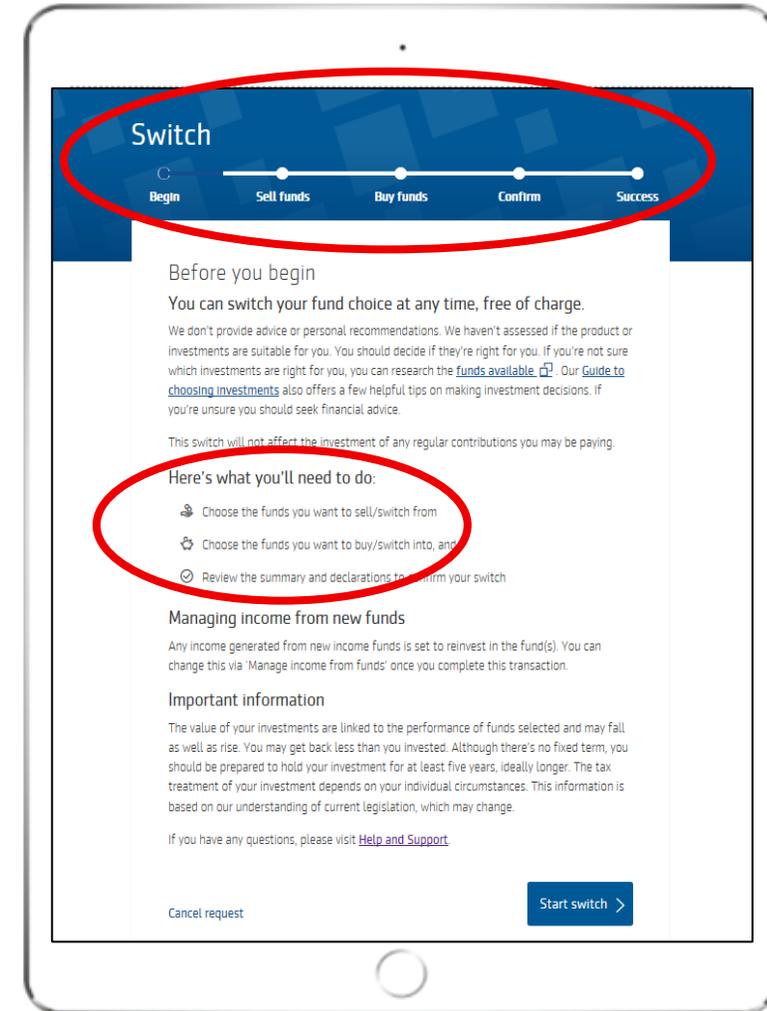
How to switch funds

1. Sign in to your Aegon Dashboard account.
2. Select the product you'd like to switch funds on.
3. Then select **Switch funds**.



Starting your switch 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 switch** to continue.



Selecting which fund(s) to sell

1. Firstly, we show the fund(s) you're currently invested in.
2. You now need to decide what fund(s) you want to sell.
 - If you want to sell 95% or less of a fund, you can choose to sell either a % or £ amount.
 - To sell more than 95% of a fund you must select the % option. If you try to sell more than 95% of a fund as £ amount - you'll get an error message.

You can sell up to a maximum of 95% by inputting a monetary value. To sell more, please use the percentage allocation.

3. Enter either the £ or % against each fund you want to sell and select **Buy funds** to continue.

The screenshot shows a mobile app interface titled "Switch" with a progress bar at the top indicating the current step is "Sell funds". The progress bar has five stages: "Begin", "Sell funds", "Buy funds", "Confirm", and "Success".

The main content area is titled "Sell funds" and includes the following text: "Select which funds you want to sell and how much. Before making a decision, you can [research funds you're currently invested in](#) and read our [guide to choosing funds](#)".

Below this text is an "Allocate using" section with two radio buttons: "%", which is selected, and "£". A note next to it says "Altering allocation method clears any values already entered."

Underneath is a "Cash" section with a value of "£165.81" and a "Sell all" option. Below this is a link: "Find out more about cash".

At the bottom of the form, there is an "Estimated total" of "£0.00".

At the very bottom of the screen, there is a "Cancel request" link on the left and a blue "Buy funds >" button on the right.

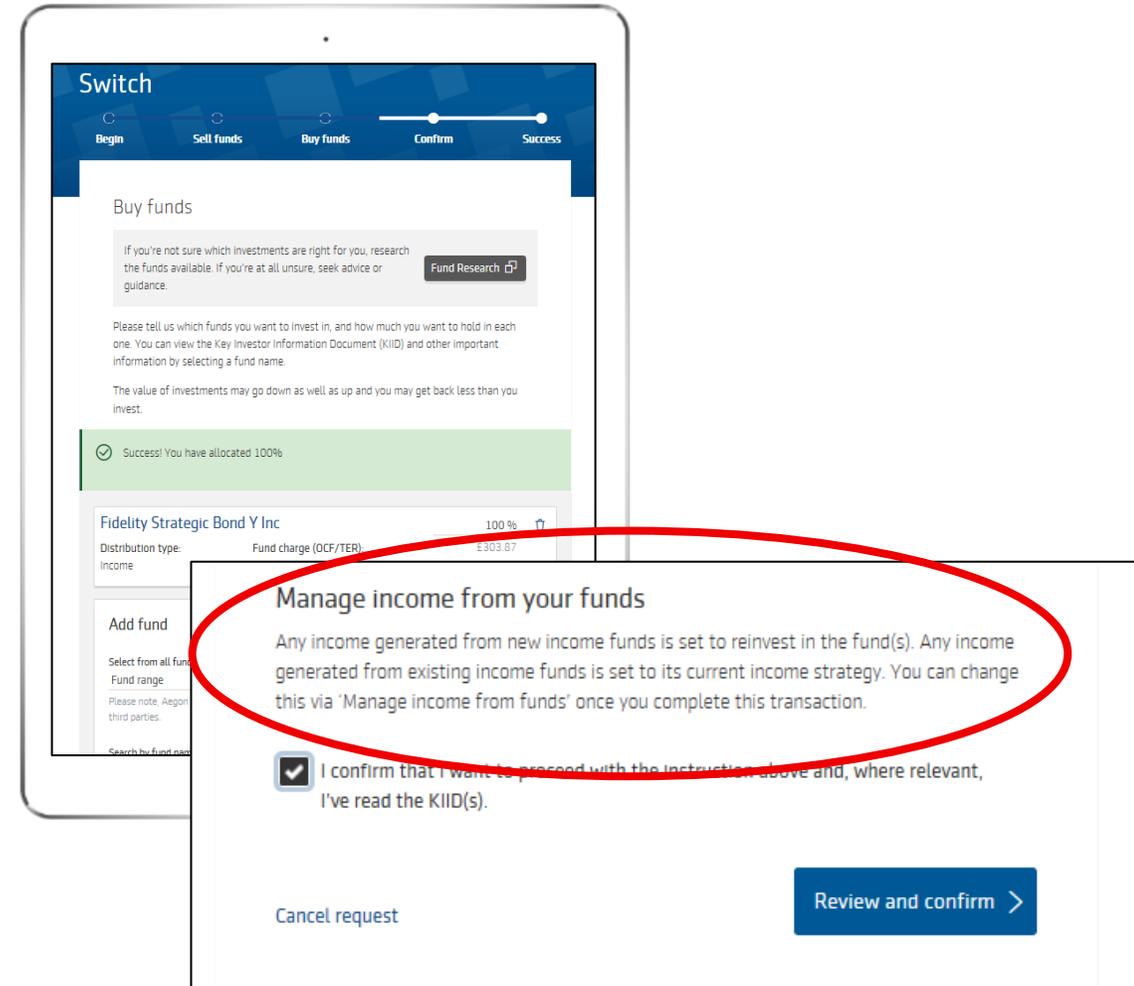
Selecting which fund(s) you want to buy

1. Now you need to select the fund(s) you want to buy.
2. Search for the fund(s) you'd like to buy.

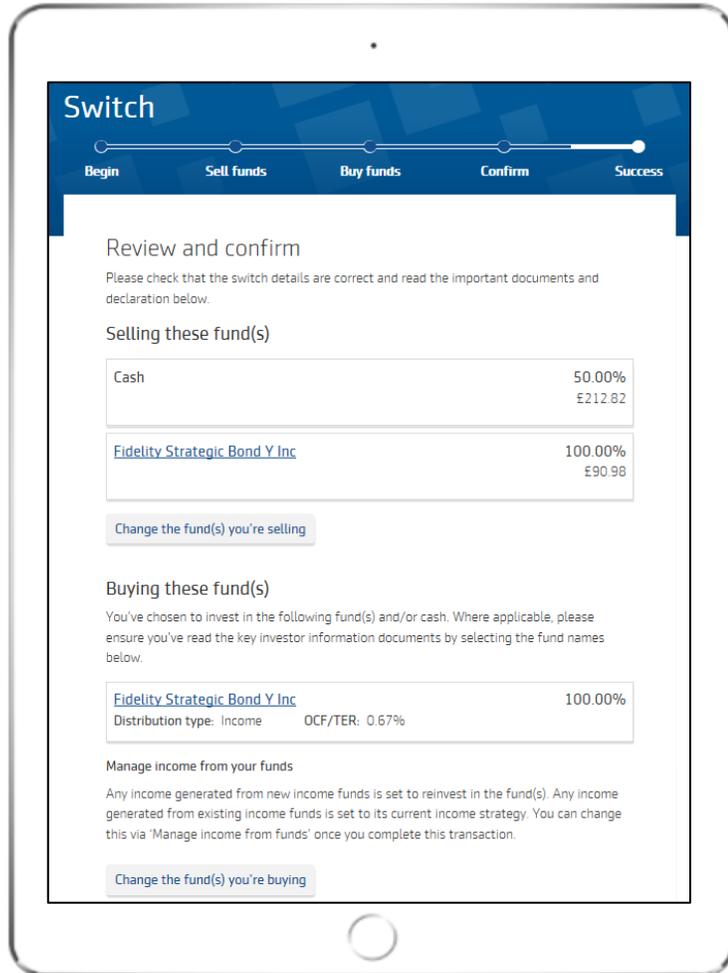
3. When you've allocated 100% against the new fund(s) you'll be able to continue.

If you buy income producing funds we'll reinvest any income back into the fund. If you want, you can change this after you complete your switch request. Our Convert fund distribution type guide will be able to help you.

4. Select **Review and confirm** to continue



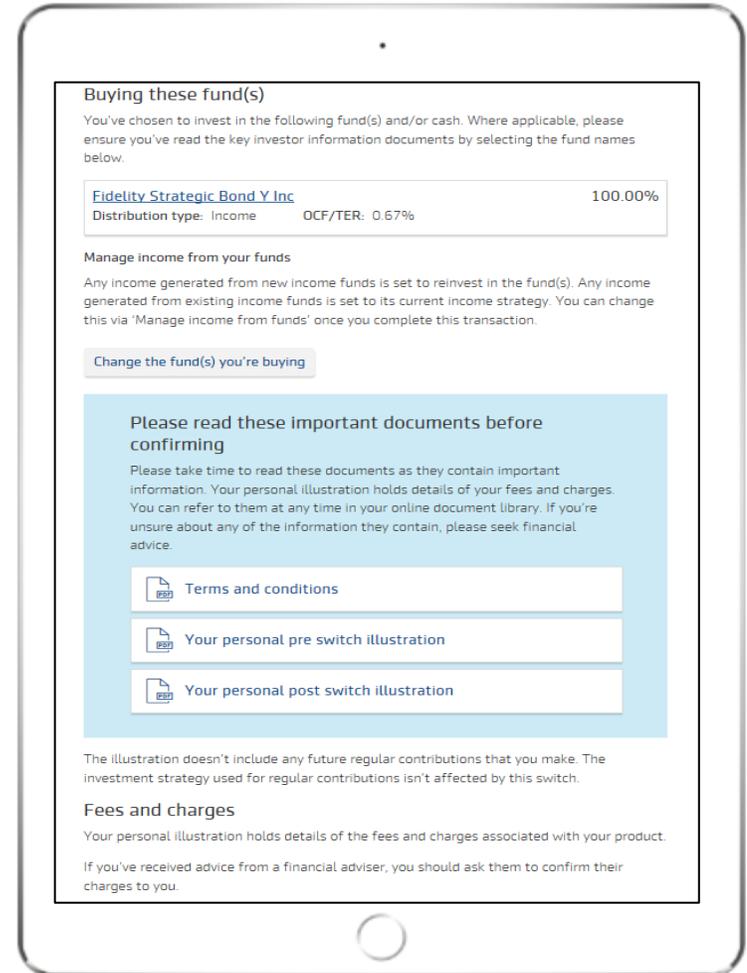
Reviewing your switch request



The **Review and confirm** screen shows the details of your switch.

Double check that you're happy with everything.

You can view illustration for pre and post the change. We'll also save these in your document store.



Completing the switch

1. Read the **Legal declaration**.
2. Confirm that you give us permission to carry out your switch.
3. Select **Confirm and switch** to complete your request.

Legal declaration

Please read before proceeding

It's important that you read the following notes on how we'll carry out your linked switch instruction.

in these important notes and your instruction:

'I', 'you', 'your' or 'my' refers to you, the Investor, and 'Aegon' refers to Cofunds Limited.

Once we receive your linked switch instruction to sell one or more investments and use the sale proceeds to purchase other investments within your Aegon GIA, we'll:

- Initiate your sale instruction – we'll do this, when we receive your clear and fully complete switch instruction, in line with our usual provisions for carrying out sale instructions as described in the Aegon Platform terms and conditions.
- Initiate your purchase instruction – we'll do this when we receive confirmation of the sale price(s) from all of the investment providers in respect of the associated sale transaction(s). We will not wait for the cleared sale fund proceeds to be received into the cash facility of your product in order to proceed with the purchase transaction.

I instruct Aegon to carry out a switch of investments in accordance with this linked switch instruction for my Aegon GIA and the Aegon Platform.

Cancel request

Confirm and switch >



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Aegon UK



Aegon UK

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