

For Aegon Platform customers

# Welcome to your Aegon Dashboard

(view and transact)



Our Aegon Dashboard is designed to help you add to, and manage your investments, giving you a greater understanding of your finances. It lets you see how your investments are performing as well as helping you and your advisers make decisions about what to do next.

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CD version of this document, please call 0345 604 4001 (call charges will vary) or visit **[aegon.co.uk/onlineform](http://aegon.co.uk/onlineform)**.

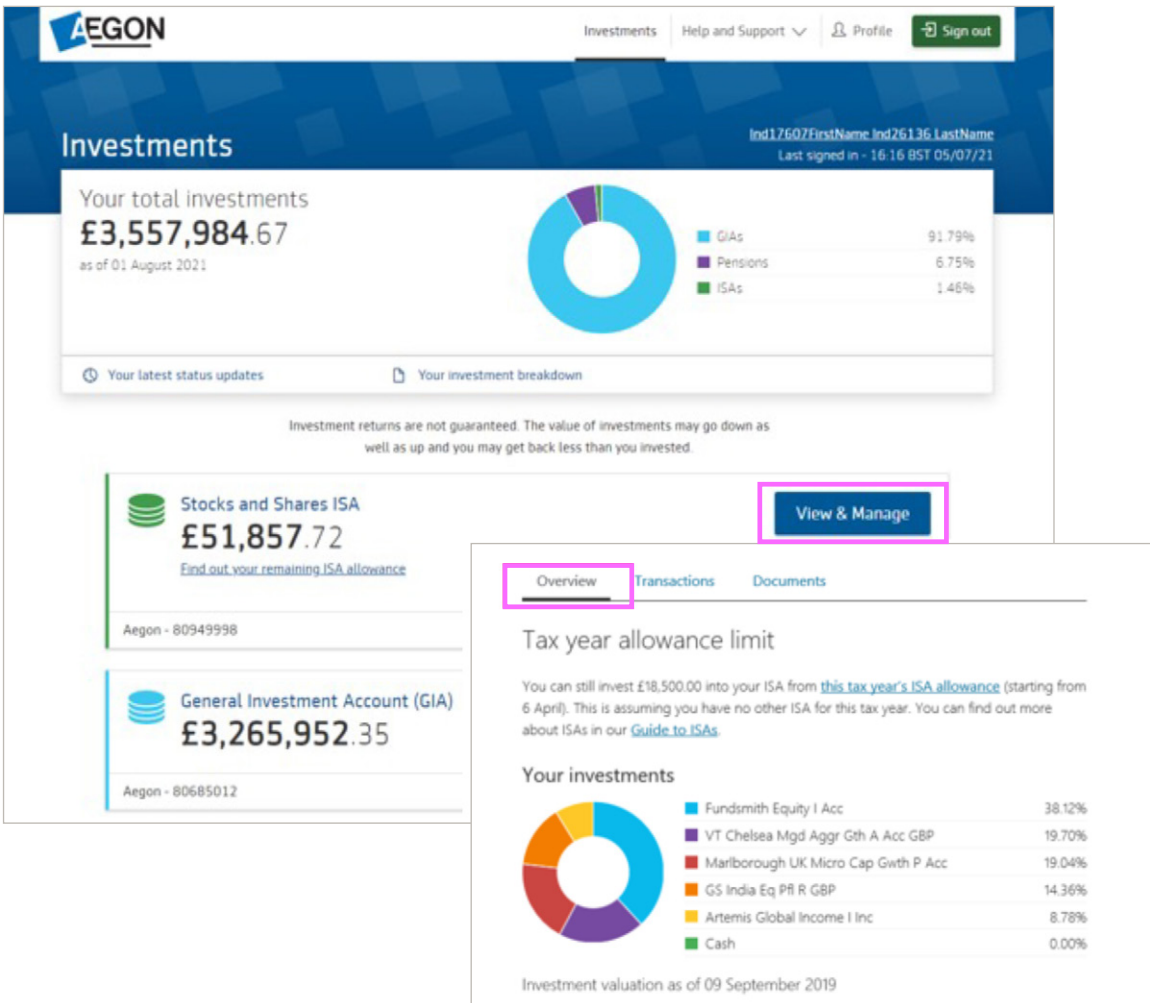


Access your Aegon Dashboard whenever, wherever – it's fully online and available on desktop, mobile or tablet.

## Making investing easier

The dashboard is full of helpful information that can support you throughout your investing journey. You can also quickly access online valuations and view and track the performance of your investments.

And it doesn't stop there. By selecting **View & Manage** you'll see a more detailed view of your product, under three tabs - **Overview, Transactions** and **Documents**.



We've made it easy for you to identify and understand transactions that have happened on your account. You can see a high-level list on your dashboard, but you can also filter the list should you want to look closely at certain transaction types. And, you can download the entire transaction history to Microsoft Excel, making it even quicker to search for the information you need.



Investments | Help and Support ▾ | Profile | **Sign out**

## Stocks and Shares ISA

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**£51,857.72**  
 Including £4.79 available cash  
 As of 02 August 2021

Top up

Switch funds

Manage regulars

More options ▾

Aegon - 80949998      Intermediary: Donald Adviser 609591

Investment returns are not guaranteed. The value of investments may go down as well as up and you may get back less than you invested.

Overview | **Transactions** | Documents

Transactions
 Filter (5) Download

Date	Transaction	In	Out
12 Aug 2020	Income distribution re-investment	£7.95	
30 Jul 2020	Switch		
15 Jul 2020	Switch		
21 Apr 2020	GIA to ISA	£20,000.00	
10 Feb 2020	Income distribution re-investment	£6.71	
16 Dec 2019	Income distribution	£0.96	
12 Nov 2019	Single contribution	£20,000.00	

### Help & Support

- What is the maximum amount I can pay into an ISA?
- Why do I have a cash facility within my ISA?
- How much tax will I pay?
- What do all the different transaction types mean?

Intermediary details ▾

We keep all your important documents relating to your investments on the Aegon Platform in one place on your dashboard. So if you're looking for your last statement or need the details of a specific application, you'll find it under the **Documents** tab.

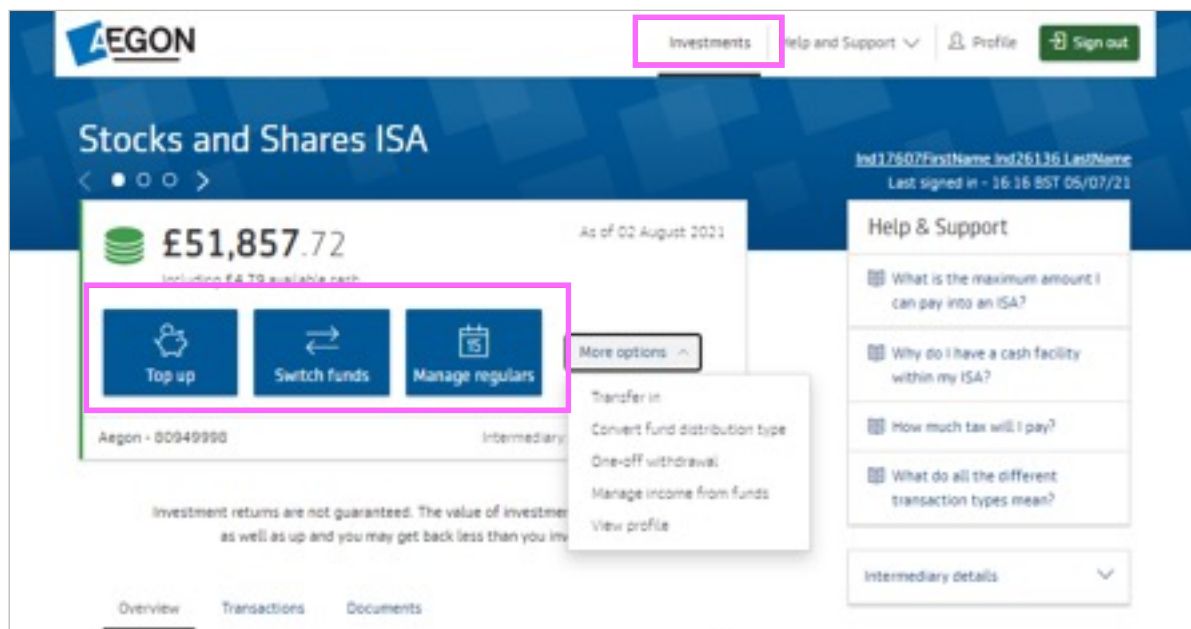
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## Transacting through your Aegon Dashboard

There are several different transactions you can perform yourself, completely online for an individual savings account (ISA) and general investment account (GIA):

- Top up
- Switch funds
- Manage regular contributions
- Cash transfer an ISA from another provider
- Convert fund distribution type from accumulation to income
- One-off withdrawal
- Manage income from funds (select whether to hold in cash, reinvest or pay as a lump sum)



### Easily update your communication preferences

Use the **Security & Notifications** tab from your **Profile** to select paperless communications and view and change the email address we have registered to your account.

## Get started with your Aegon Dashboard

If you and your adviser decide the Aegon Dashboard is right for you, you can request your own activation code at **[customerdashboard.aegon.co.uk/login](https://aegon.co.uk/login)**

We'll ask you for a few details including your product number and customer number – these are shown on letters we've sent you about your product. But don't worry if you can't find them, your adviser should have a copy.

We'll then send you an activation email and send you an activation code by post. Once you've received both, follow the instructions in your email to complete the activation process – assigning yourself a username, password and security details. From here, you can start to enjoy access to your own Aegon Dashboard.

Although you'll have access to your own investments, your relationship with your adviser will stay the same. It's just that with the Aegon Dashboard, keeping track and managing your investments becomes easier and more straightforward.

### Need more help?



If you have any questions you can speak to your adviser or visit **[aegon.co.uk/support](https://aegon.co.uk/support)**

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