



For customers

Signing in and using the Aegon Customer Dashboard

The screens shown are for demonstration purposes only. They don't represent a real customer.



How to sign in

This guide shows how you can activate your Aegon Customer Dashboard account.

You can also see how to sign in once you've activated, navigate around your account, and request a password reset.





Activating your account

Activating your account

If you have your activation email, open this and select **Activate my account**. You can then proceed to the next page of this guide.

If you don't have your activation email, go to ap3.aegon.co.uk/login and select **setup your online access**.

setup your online access.'"/>

Aegon Customer Dashboard

Sign in

Email address

Password

Forgotten Password

Sign in

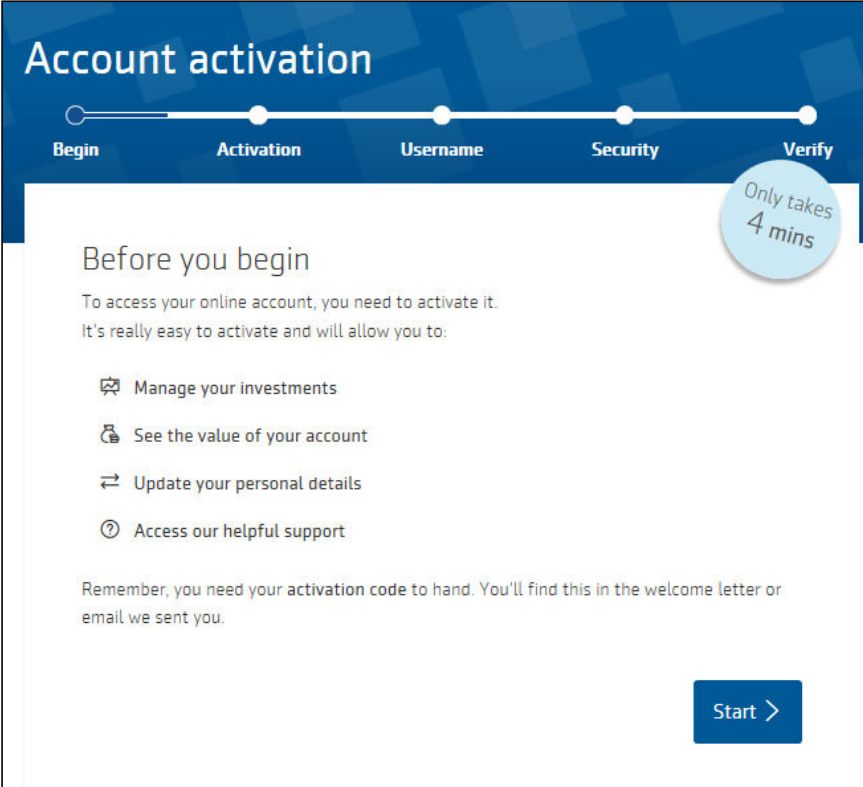
Setup online access

If you've been given an activation code you can go ahead and [setup your online access](#).

Activating your account – begin

You'll need the 10-digit activation code we sent you in the welcome email or letter.
If you don't have this, **contact us**.

If you have your 10-digit activation code, read over the information and then select **Start**.



The screenshot shows the 'Account activation' process at the 'Begin' stage. A progress bar at the top indicates the steps: Begin, Activation, Username, Security, and Verify. The 'Begin' step is currently active. A circular badge in the top right corner states 'Only takes 4 mins'. The main content area is titled 'Before you begin' and explains that to access the online account, activation is required. It lists four benefits: managing investments, seeing account value, updating personal details, and accessing support. A reminder at the bottom states that the activation code is found in the welcome letter or email. A blue 'Start >' button is located in the bottom right corner.

Account activation

Begin Activation Username Security Verify

Only takes 4 mins

Before you begin

To access your online account, you need to activate it. It's really easy to activate and will allow you to:

- Manage your investments
- See the value of your account
- Update your personal details
- Access our helpful support

Remember, you need your activation code to hand. You'll find this in the welcome letter or email we sent you.

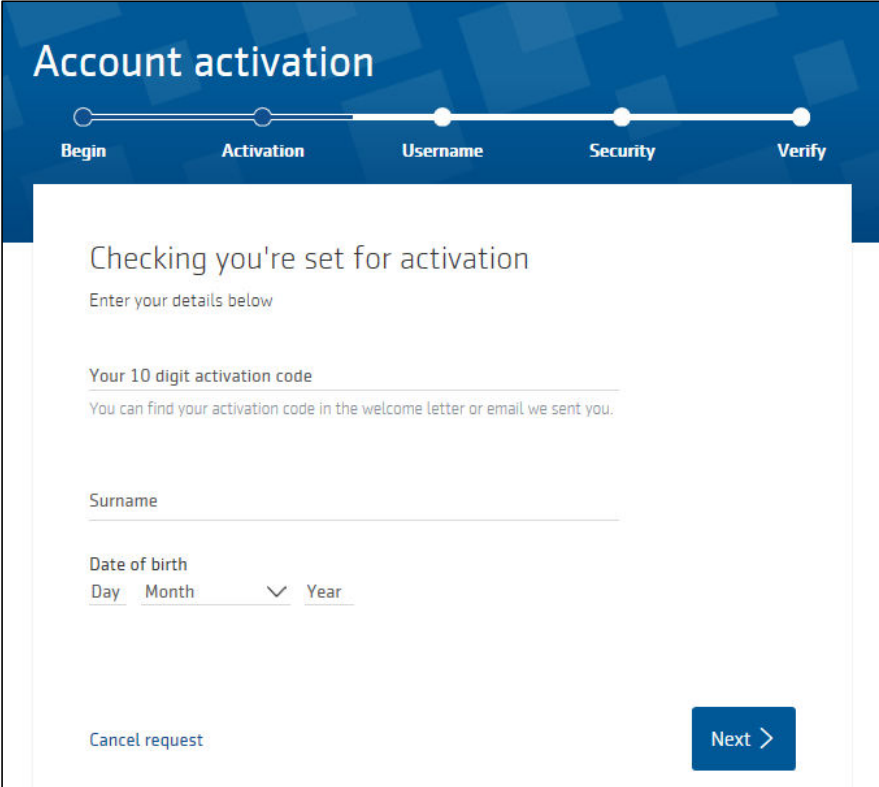
Start >

Activating your account – activation

Enter:

- **Your 10-digit activation code**
- **Surname**
- **Date of birth**

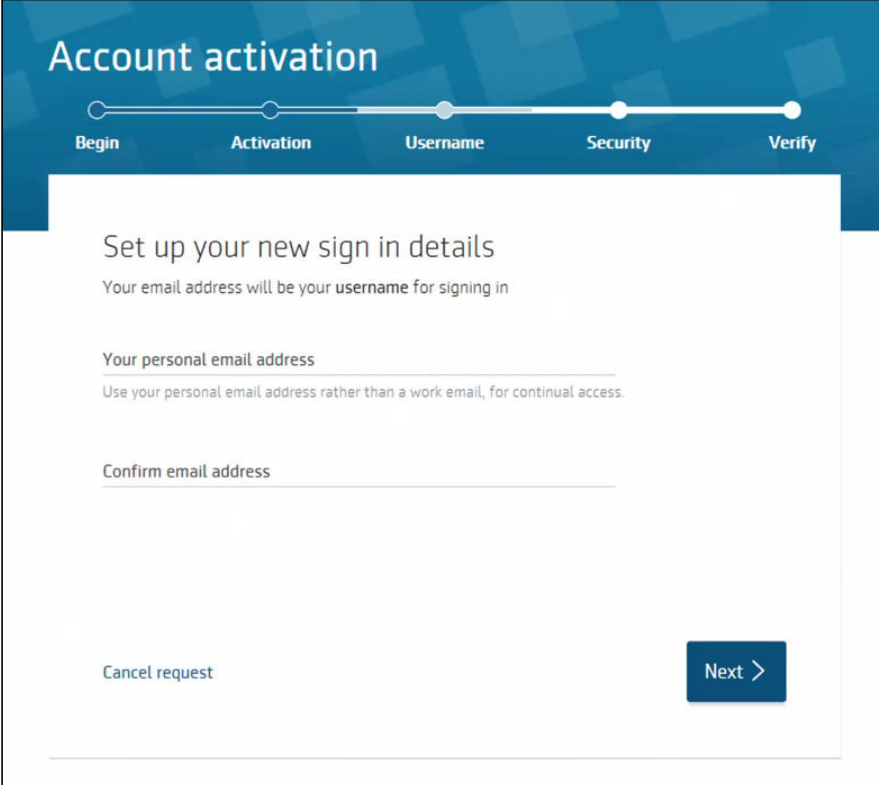
Select **Next** to continue.



The screenshot displays the 'Account activation' interface. At the top, a progress bar shows five steps: 'Begin', 'Activation', 'Username', 'Security', and 'Verify'. The 'Activation' step is currently active. Below the progress bar, the heading reads 'Checking you're set for activation' with the instruction 'Enter your details below'. The form contains three main sections: 'Your 10 digit activation code' with a text input field and a note that the code is found in the welcome letter or email; 'Surname' with a text input field; and 'Date of birth' with separate input fields for 'Day', 'Month', and 'Year', and a dropdown arrow between 'Month' and 'Year'. At the bottom left is a 'Cancel request' link, and at the bottom right is a blue 'Next >' button.

Activating your account – user name

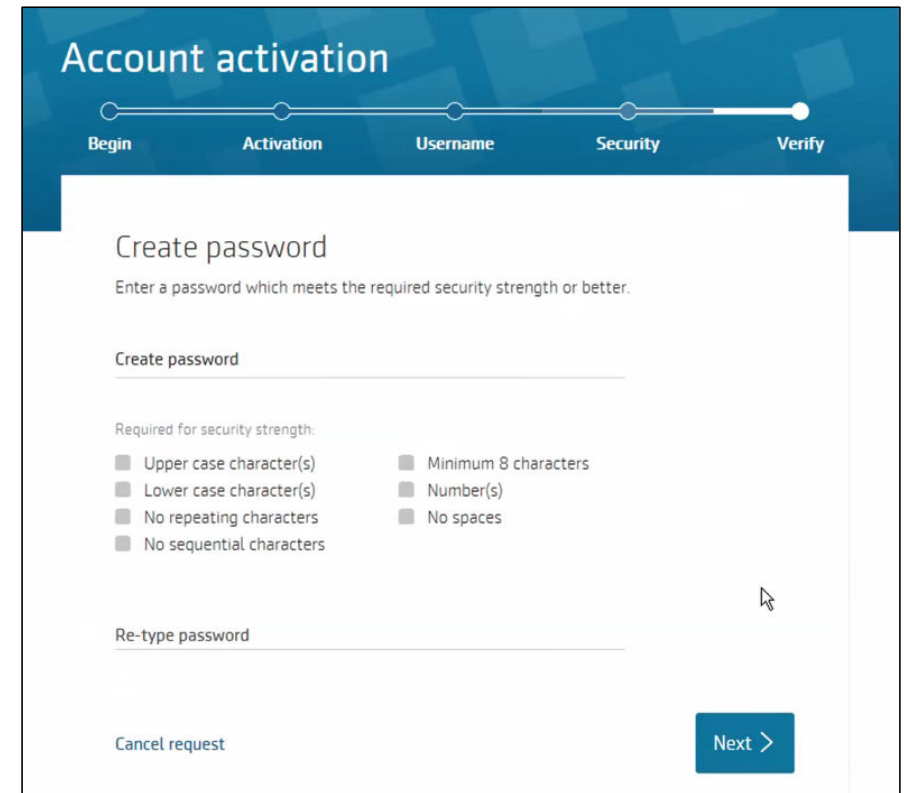
- Enter **Your personal email address** and **Confirm your email address** by entering it a second time. This is just to make sure it's correct.
- Select **Next** to continue.



The screenshot shows a web interface for 'Account activation'. At the top, there is a progress bar with five steps: 'Begin', 'Activation', 'Username', 'Security', and 'Verify'. The 'Username' step is currently active. Below the progress bar, the main content area is titled 'Set up your new sign in details' and includes the instruction 'Your email address will be your username for signing in'. There are two input fields: 'Your personal email address' and 'Confirm email address'. A note below the first field states 'Use your personal email address rather than a work email, for continual access.' At the bottom left, there is a 'Cancel request' link, and at the bottom right, there is a blue 'Next >' button.

Activating your account – security

- Now you need to set up a password for your account.
- Your password must meet our security strength criteria.
- As you type your password each criteria will be coloured green to confirm you've met it. If it's not been met, it will show as red.
- We then ask you to **Re-type password**.
- Select **Next** to continue.



The screenshot shows a web interface for 'Account activation'. At the top, a progress bar indicates five steps: 'Begin', 'Activation', 'Username', 'Security', and 'Verify'. The 'Security' step is currently active. The main content area is titled 'Create password' and includes the instruction 'Enter a password which meets the required security strength or better.' Below this is a text input field labeled 'Create password'. Underneath the input field, a section titled 'Required for security strength:' lists six criteria, each with a grey square indicator: 'Upper case character(s)', 'Lower case character(s)', 'No repeating characters', 'No sequential characters', 'Minimum 8 characters', and 'Number(s)'. Below the criteria is another text input field labeled 'Re-type password'. At the bottom left, there is a link 'Cancel request', and at the bottom right, there is a blue button labeled 'Next >'. A mouse cursor is visible over the 'Next >' button.

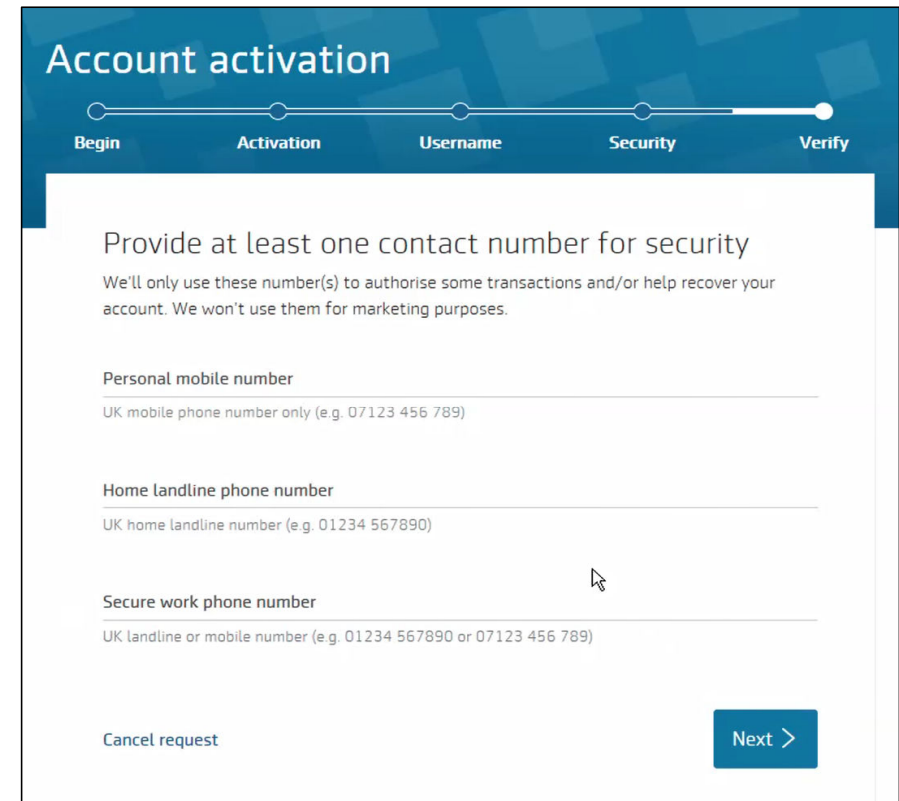
Activating your account – verify

We now need to you to give us a contact number we so have this for security checks in the future.

Complete at least **one** of the following:

- **Personal mobile number**
- **Home landline phone number**
- **Secure work phone number**

Select **Next** to continue.



The screenshot shows the 'Account activation' process at the 'Verify' stage. A progress bar at the top indicates the steps: Begin, Activation, Username, Security, and Verify (which is currently active). The main content area has a heading 'Provide at least one contact number for security' and a sub-heading 'We'll only use these number(s) to authorise some transactions and/or help recover your account. We won't use them for marketing purposes.' Below this are three input fields: 'Personal mobile number' (with a sub-note 'UK mobile phone number only (e.g. 07123 456 789)'), 'Home landline phone number' (with a sub-note 'UK home landline number (e.g. 01234 567890)'), and 'Secure work phone number' (with a sub-note 'UK landline or mobile number (e.g. 01234 567890 or 07123 456 789)'). At the bottom left is a 'Cancel request' link, and at the bottom right is a blue 'Next >' button.

Activating your account – verify

Finally we need you to **Create a 6-digit security PIN.**

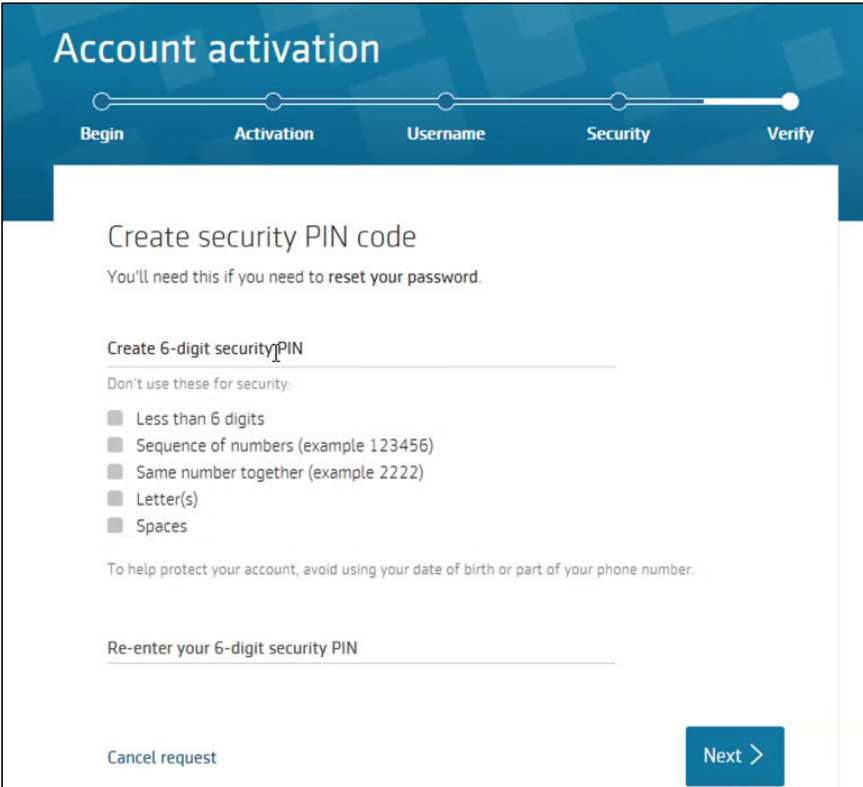
You'll need this in the future if you have to reset your password.

Your PIN must meet our security strength criteria.

As you type your PIN each criteria will be coloured green to confirm you've met it. If it's not been met, it will show as red.

We then ask you to **Re-enter your 6-digit security PIN.**

Select **Next** to continue.

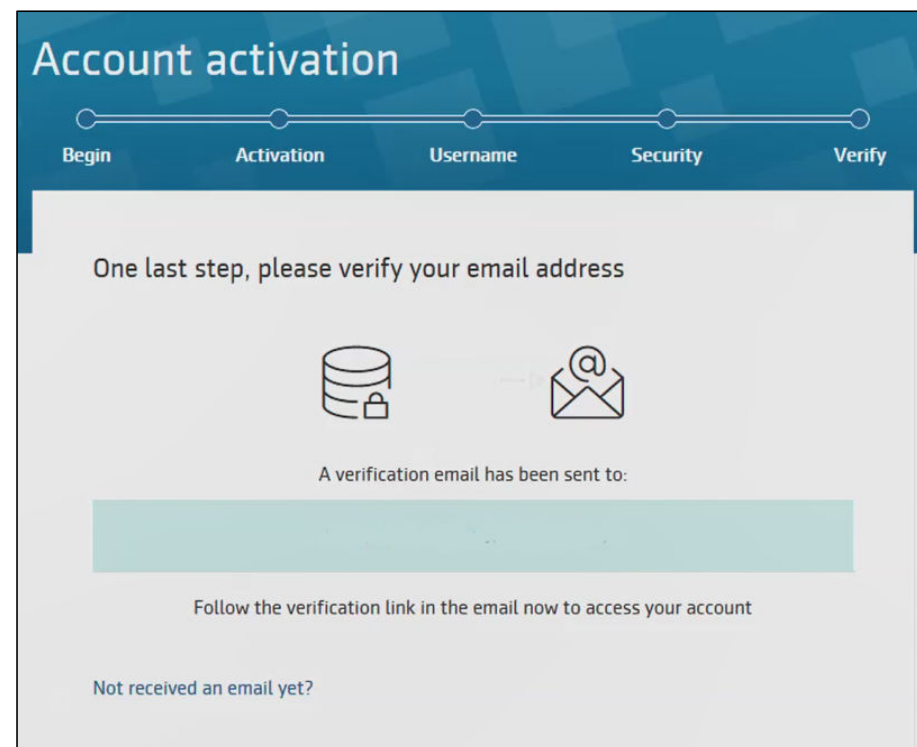


The screenshot shows the 'Account activation' process at the 'Security' stage. A progress bar at the top indicates the current step. The main heading is 'Create security PIN code', with a sub-note: 'You'll need this if you need to reset your password.' Below this is a text input field labeled 'Create 6-digit security PIN'. A list of security criteria is provided, each with a grey square indicator: 'Less than 6 digits', 'Sequence of numbers (example 123456)', 'Same number together (example 2222)', 'Letter(s)', and 'Spaces'. A note states: 'To help protect your account, avoid using your date of birth or part of your phone number.' Below the input field is a second input field labeled 'Re-enter your 6-digit security PIN'. At the bottom left is a 'Cancel request' link, and at the bottom right is a blue 'Next >' button.

Activating your account – verify

If we haven't verified your email address previously, you will then receive a **verification email**.

You can select the link in the email to sign in to the **Customer Dashboard**.





Signing in to the Aegon Customer Dashboard

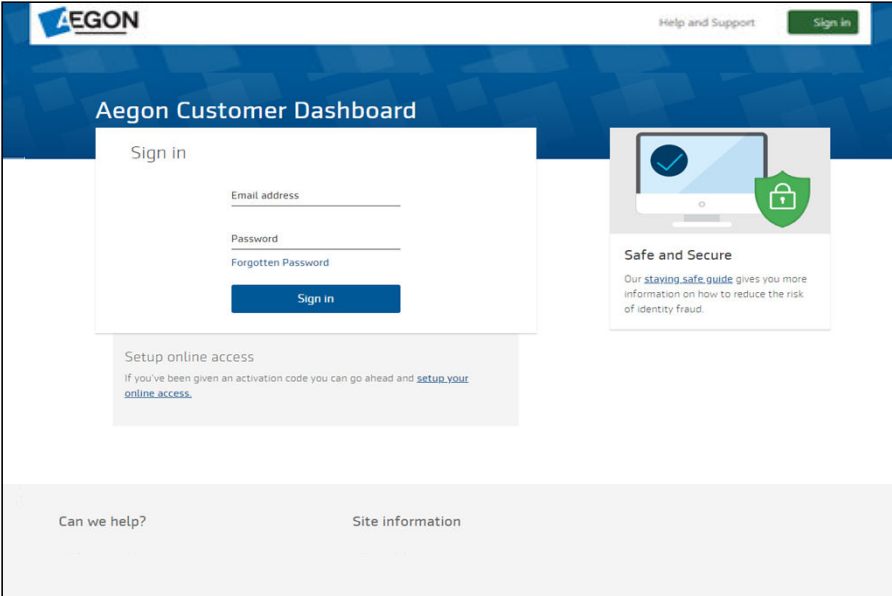
Signing in to the Aegon Customer Dashboard

Go to ap3.aegon.co.uk/login

Enter your **Email address** and **Password**

If you've forgotten your sign in details,
please select **Forgotten password**

- Then select **Sign in**



The screenshot shows the Aegon Customer Dashboard login page. At the top left is the AEGON logo. At the top right are links for 'Help and Support' and a 'Sign in' button. The main heading is 'Aegon Customer Dashboard'. Below this is a 'Sign in' section with three input fields: 'Email address', 'Password', and 'Forgotten Password'. A blue 'Sign in' button is positioned below these fields. To the right of the sign-in form is a 'Safe and Secure' section featuring a laptop icon with a checkmark and a shield icon, with text stating: 'Our staying safe guide gives you more information on how to reduce the risk of identity fraud.' Below the sign-in form is a 'Setup online access' section with the text: 'If you've been given an activation code you can go ahead and [setup your online access](#).' At the bottom of the page are two links: 'Can we help?' and 'Site information'.



Navigating your account

Navigating your account

Once you've signed in, you'll see all your products listed.

You can see the value of **Your total investments**.

You can also see the value of each product you have along with an option to **View & Manage** at a product level.

You can also see **Portfolio Scan** that you can use to give you various reports of your investments.

The screenshot displays the Aegon Investments dashboard. At the top, the Aegon logo is on the left, and navigation links for 'Investments', 'Help and Support', 'Profile', and 'Sign out' are on the right. The main heading is 'Investments', with user details 'Ind70774First Name Ind7569 LastName' and 'Last signed in - 17:18 BST 30/03/20' on the right. The central section shows 'Your total investments' as £417,572.87 as of 30 March 2020. A donut chart breaks down the total into 64.71% for GIAs (General Investment Accounts) and 35.29% for ISAs (Individual Savings Accounts). Below this is a 'Your investment breakdown' section with a disclaimer: '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.' Three investment products are listed, each with a 'View & Manage' button: 1. Aegon Stocks & Shares ISA (£147,348.26), Aegon - 90001667, contact: Nationwide. 2. Aegon General Investment Account (£244,288.91), Aegon - 90001669, contact: Nationwide. 3. Aegon General Investment Account (£25,935.70), Aegon - 90001668, contact: Nationwide. At the bottom, there is a 'Portfolio Scan' section with a brief description and a link to 'View portfolio scan'.

View & Manage

Selecting **View & Manage** against one of your products lets you see more information on that product.

The most popular requests people want to carry out are at the top.

- **Top up** – add more money to your product
- **Switch funds** – change the funds you're invested in
- **Manage regulars** – set up, amend or delete regular payments or withdrawals

Other requests are under **More options**.

You can also see an **Overview**, **Transactions**, **Charges** and **Documents** for your product.

The screenshot shows the Aegon Stocks & Shares ISA management interface. At the top, the Aegon logo is on the left, and navigation links for 'Investments', 'Help and Support', 'Profile', and 'Sign out' are on the right. The main header displays 'Aegon Stocks & Shares ISA' and user information: 'Ind1029FirstName Ind39814 LastName' and 'Last signed in - 14:00 GMT 24/01/20'. The central panel shows a balance of '£36,924.38' as of 24 January 2020, including '£0.00 available cash'. Below the balance are three main action buttons: 'Top up', 'Switch funds', and 'Manage regulars', along with a 'More options' dropdown. A 'Your contact: Nationwide' dropdown is also visible. Below this, a disclaimer states: '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.' A navigation bar includes 'Overview', 'Transactions', 'Charges', and 'Documents'. The 'Tax year allowance limit' section indicates that the user can still invest £20,000.00 into their ISA from this tax year's allowance (starting from 6 April). The 'Your investments' section features a donut chart showing 100.00% invested in 'L&G Mixed Investment 20-60% C Acc'. Below the chart, the investment valuation as of 24 January 2020 is shown. A search table is provided with the following data:

Investment	Units	Price	Value	%
L&G Mixed Investment 20-60% C Acc	55,743.333	£0.6624	£36,924.38	100.00%



Resetting your password

Resetting your password

If you forget your password you can reset your password.

Select **Forgotten Password**

If your account is locked please **contact us**.

setup your online access'." data-bbox="544 270 946 775"/>

Aegon Customer Dashboard

Sign in

Email address

Password

Forgotten Password

Sign in

Setup online access

If you've been given an activation code you can go ahead and [setup your online access](#).

Resetting your password

Read over the information shown and then select **Start**.

Request password reset

Begin Email Address Verify

Before you begin

Select 'Start' below to begin a two-step process to reset your password. You'll be asked to enter and verify your email address.

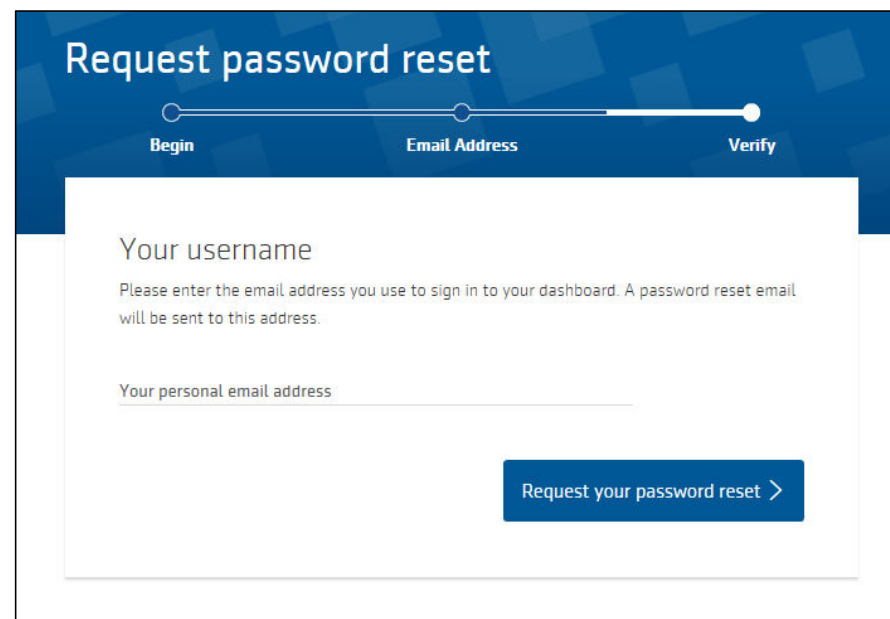
If you're worried about your account security, please read our [staying safe guide](#)

Start >

Resetting your password – email address

Enter **Your personal email address** you use to sign in to your Aegon Customer Dashboard account.

Select **Request your password reset**.



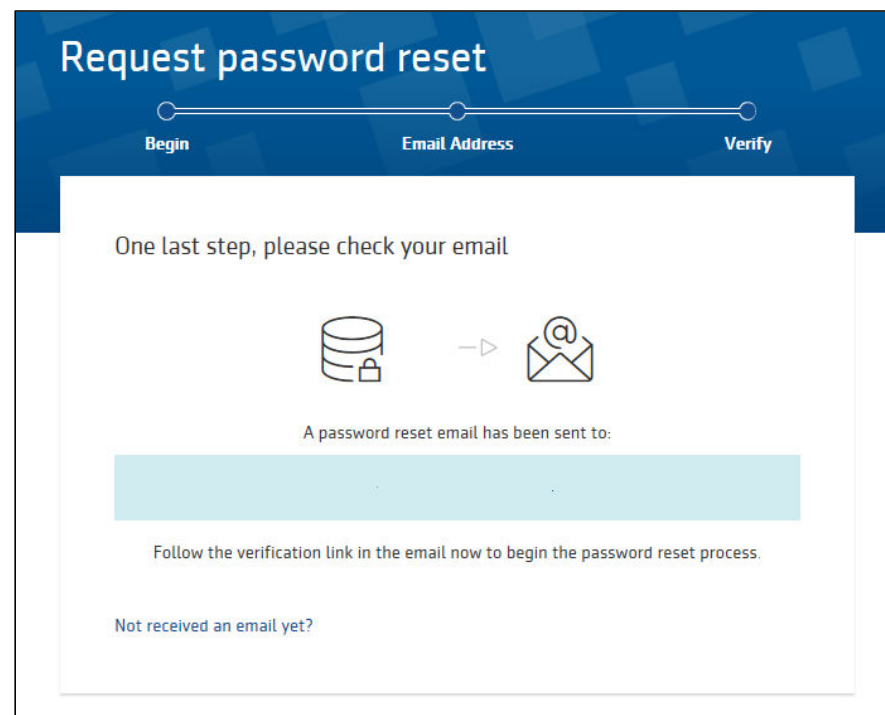
The screenshot shows a web form titled "Request password reset" with a blue header. A progress bar at the top indicates three steps: "Begin", "Email Address", and "Verify". The "Email Address" step is currently active. The main content area is white and contains the following text: "Your username" followed by "Please enter the email address you use to sign in to your dashboard. A password reset email will be sent to this address." Below this is a text input field labeled "Your personal email address". At the bottom right of the form is a blue button with the text "Request your password reset >".

Resetting your password – verify

We'll now send you an email.

Check your inbox – if it's not there, give it a few minutes. If still not there, check your junk mail folder.

Now follow the instructions in the email.





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