



For customers

Ad hoc withdrawal

Aegon Retirement
Choices (ARC)



Ad hoc withdrawal

This guide explains how to take a singular, one-off amount from an ISA or GIA, for ARC.

Ad hoc withdrawals can't be completed online. You can request the withdrawal by completing the Withdrawal instruction form.

This request has a standard working timescale of 11 working days. This time includes selling funds, where applicable, and processing the payment to you.

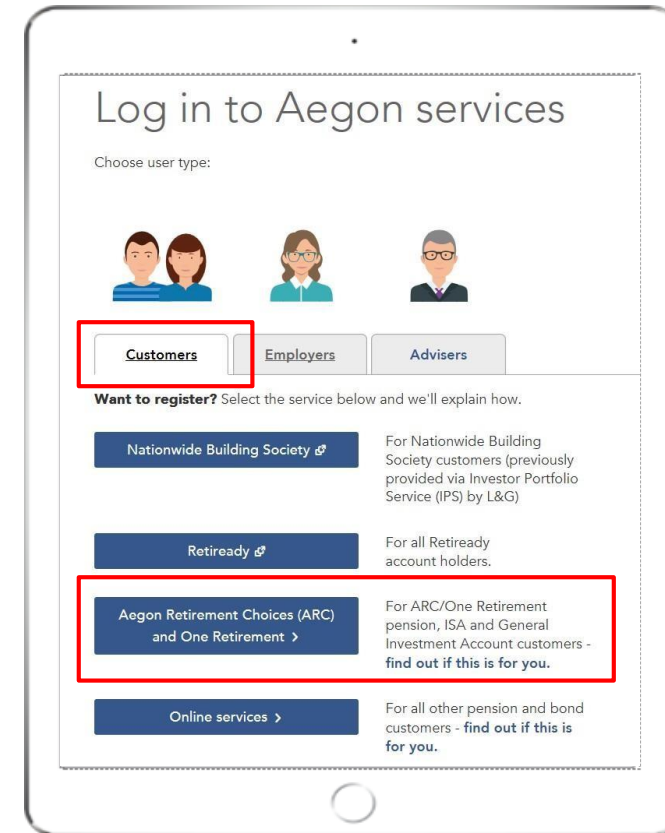


Logging in to ARC and One Retirement

1. Go to aegon.co.uk/login.
2. Choose your user type by selecting **Customers**.
3. Then select **Aegon Retirement Choices (ARC) and One Retirement**, as shown to the right.
4. On the following page select **Login**, as displayed below.

Aegon Retirement Choices and One Retirement login

Login



Logging in to ARC and One Retirement

1. Enter your 8 digit **User ID** and **password**.

You can find your **User ID** in the activation email we sent you.

2. Select the **I'm not a robot** box. You might be asked to select the images on the login screen.

3. Then select **Log in**.

If you've forgotten your password select **Forgotten your password?**

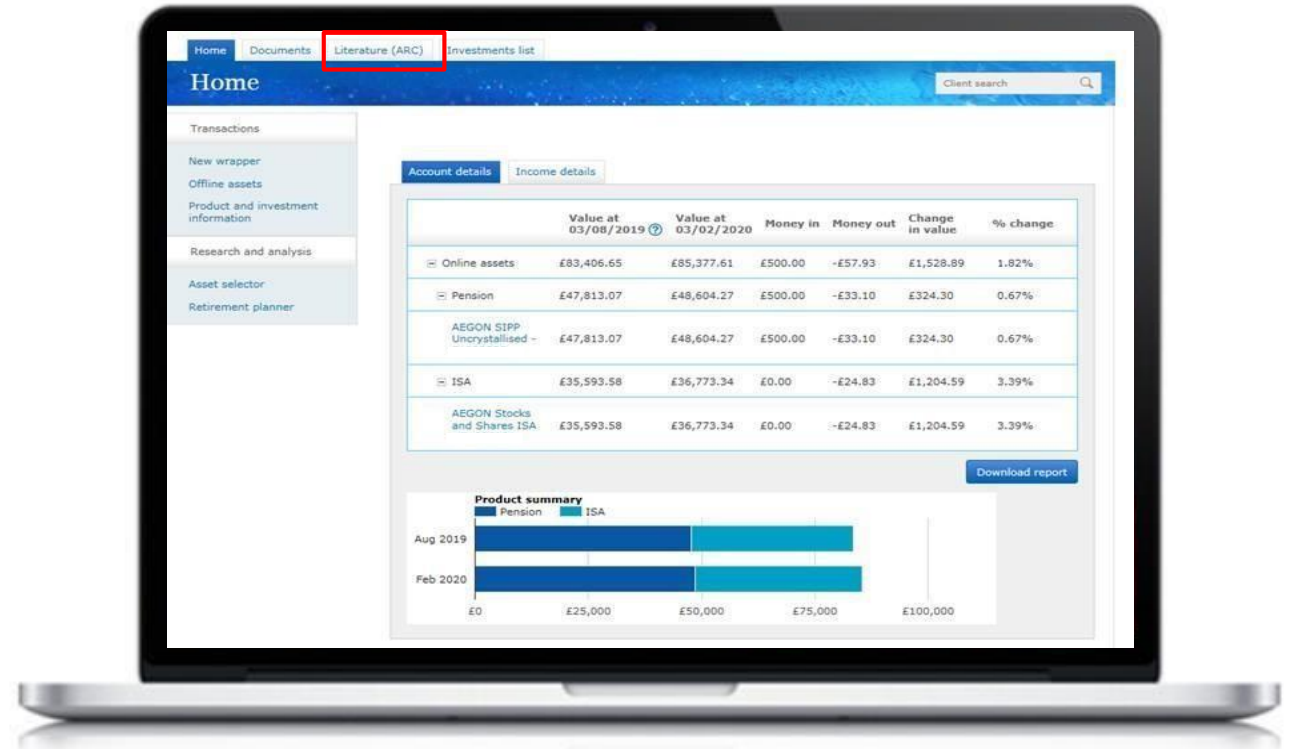


The image shows a mobile app interface for AEGON. At the top is the AEGON logo. Below it is a blue header with the text "Log in". Underneath the header, it says "Please log in below". The main login area is a light blue box containing the following elements: a "Log in" label, a "User ID:" label followed by a text input field, a "Password:" label followed by a text input field, a checkbox labeled "I'm not a robot", a reCAPTCHA logo with "reCAPTCHA Privacy - Terms" text, a blue "Log in" button, and a link labeled "Forgotten your password?". Red rectangular boxes are drawn around the User ID input field, the Password input field, the "I'm not a robot" checkbox, and the "Log in" button.

Finding the right form

Once you've logged in, you'll be taken to the **Home** page.

You can find the right form for an ad hoc withdrawal, under the **Literature (ARC)** tab.



Finding the right form

From here, the ARC document library will load in a new pop-up window.

Select **Client forms** and then **Withdrawal instruction**.

If you're the only account holder you can type your name in the signature box on the form and email it to clientsupport@arc.aegon.co.uk

However, if there's more than one account holder, you'll need to complete this form in black ink and post to:

Aegon Digital Solutions
Sunderland
SR43 4DL

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 so please consider this and do not include any personally sensitive, financial or banking information that hasn't been appropriately secured.

Pre-sale client documents

Client forms

Uncrystallised funds pension lump sum payment instruction (PDF 320Kb)

Ad-hoc income request (PDF 136Kb)

Death benefit nomination form (PDF 138Kb)

Change of investor details (PDF 86.3Kb)

Change to product details (PDF 84.7Kb)

The Pension Death Benefits Trust - English Law version (PDF 222Kb)

The Pension Death Benefits Trust - Scottish Law version (PDF 274Kb)

Withdrawal instruction (PDF 95.9Kb)

Direct Debit instruction - reference 'Aegon SIPP' (PDF 109Kb)

Benefit crystallisation event application form (capped drawdown) (PDF)


Capped to flexi-access drawdown form (PDF)

Requesting a withdrawal

Once we've received the withdrawal form, your withdrawal will be made within 11 working days.

If there are insufficient funds in the cash facility, please complete a **switch into assets**.

To complete your request, we may need more information from you including verifying your bank details or signature.



For customers

Withdrawal instruction

You should complete this form to request a withdrawal from an Aegon product wrapper. Withdrawals from the Aegon SIPP must be made using the Benefit crystallisation event application. To make a withdrawal from more than one product wrapper, please complete a form for each. Please complete this form by typing in the boxes, including the signature box and emailing it to clientsupport@arc.aegon.co.uk

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 when sending us sensitive information.

If you'd like a large print, Braille or audio CD version of this document, please contact us on 0345 680 1234 (call charges will vary) or at aegon.co.uk/onlineform We're always here to help so if you need some additional support from us please let us know.

1. Investor details

Please confirm the product type, for example General Investment Account (GIA) and number from which this withdrawal should be taken.

Product wrapper name	Investor name(s)
<input type="text"/>	<input type="text"/>
Product wrapper number	
<input type="text"/>	

2. Withdrawal instruction

Amount of withdrawal

£


or


%

☐ The wrapper is to remain active (any Direct Debits, expectations, rebalancing etc will remain in place).

Payments will typically take up to 10 business days to reach your nominated bank account.

Partial withdrawals: 0.25% of your total investment must be held in the cash facility for each product wrapper. Before submitting a withdrawal instruction please make sure sufficient cash is available, including the 0.25% balance, or it will delay the payment process. See the terms and conditions for further information.

 Pensions | Investments | Protection



3. Bank details

Your payment will be made to your nominated bank account as detailed below.

Name of bank/building society

Account name

Branch sort code

--

Account number

Note: If this is the first payment to your nominated bank account, a certified copy of your bank statement may be required. A certified copy of your driving licence may also be required as proof of signature. Payments can only be made to accounts in your name.

4. Authorisation

- For an Individual Savings Account or individual General Investment Account – one signature is required.
- For a joint General Investment Account or if set up under trust agreement or by a corporate body – all registered holder(s) signature(s) required.

You should sign and date this form by typing your full name in the signature boxes below and typing the date in the date boxes or by using any other electronic signature method we have agreed, in writing with your adviser, to accept. Your typed name or agreed electronic signature method in the signature boxes will be your signature. When you sign the form, by typing your name in the boxes or using the agreed electronic signature method, you are making the declarations and confirming that you wish to proceed with the instructions in this form.

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<input type="text"/>	<input type="text"/>
Signature (type name here)	Signature (type name here)
<input type="text"/>	<input type="text"/>

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Aegon UK



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DIR386841 05/23