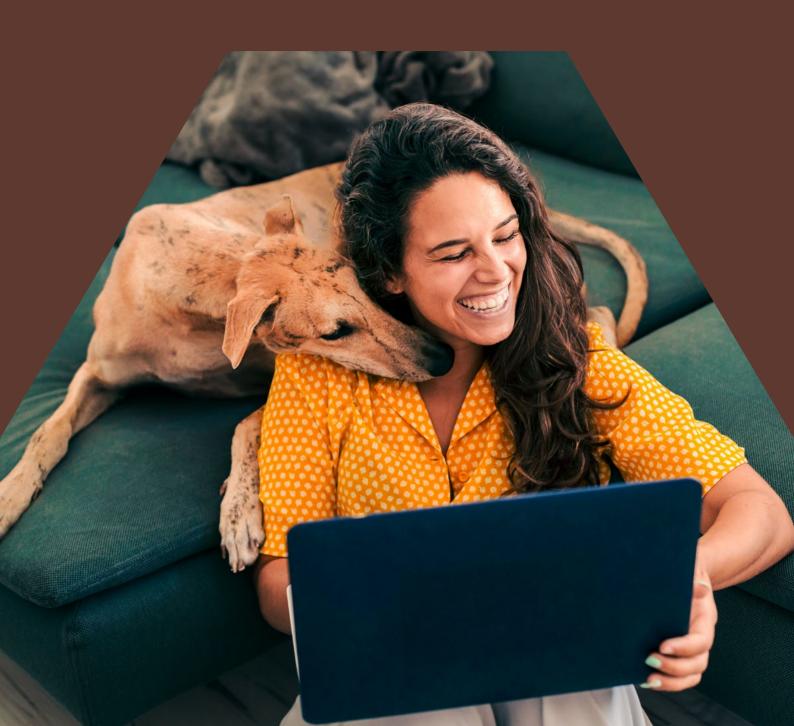


For customers

# Welcome to your dashboard (view and transact)



Our dashboard is designed to give you an overview of your Aegon Retirement Choices (ARC) account, allowing you to add to and manage your investments. You can see how your investments are performing, helping you and your financial adviser make decisions about what to do next.

		Last logged in: 23 March 2024 1
ood morning, Simon David Jo	DNES (21045752)	
our dashboard		Adviser details
		John Arthur McCrae
at 24 March 2024	Since start date 17 March 2022	McCrae and Wilson Advisers Ltd
otal value	Return	
<b>176,947</b> .09	<b>+£2,200</b> .36	
	▲ +1.3% Learn more about returns	
Kingfisher retirement scheme Self-invested Personal Pens £57,687.57 Includes available of	cash of: £10,000.00	2245
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If you and your adviser decide the dashboard is right for you, you can log in at **digital.aegon.co.uk/customer/authenticate/login** 

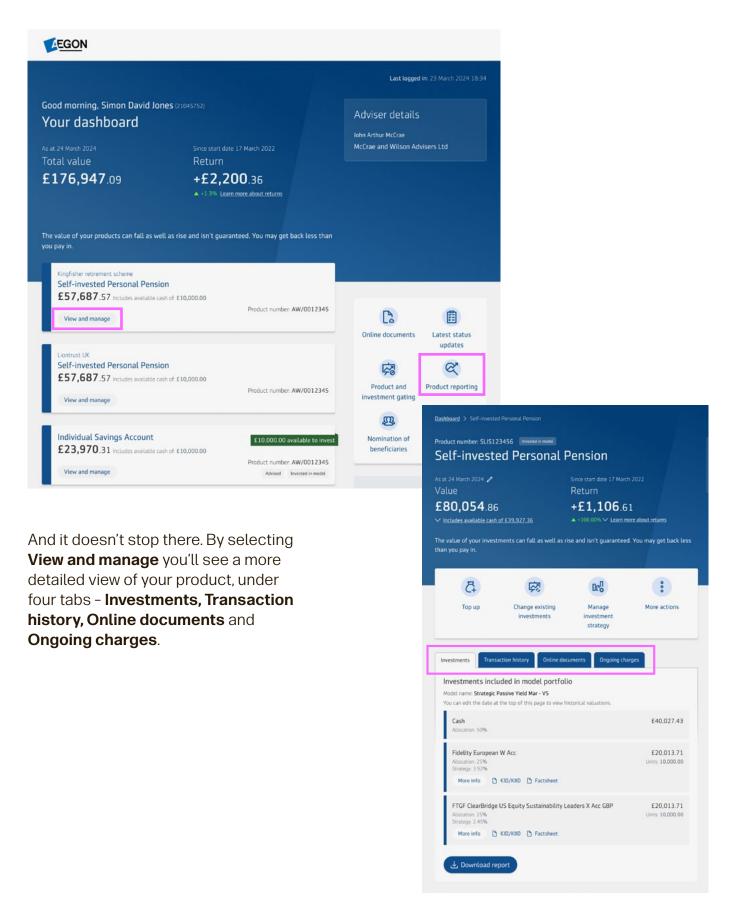
If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CV version of this document, please call 0345 606 1680 (call charges will vary) or visit **aegon.co.uk/onlineform** 



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

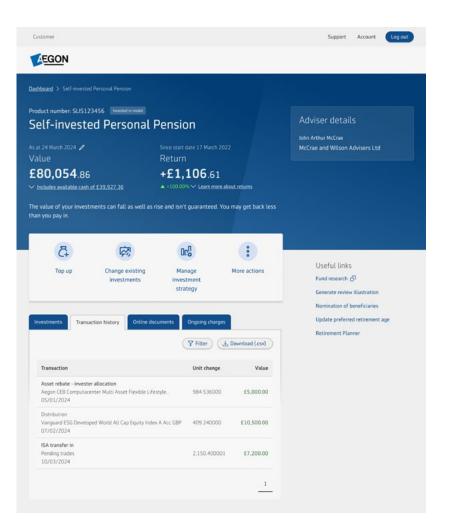
#### Making investing easier

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.



#### See your transactions as they happen

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 if you want to look closely at certain transaction types.





#### **Product reporting**

By selecting the Product reporting button on your dashboard, you can see details of your investment performance and valuations, and even choose to download a report.

# All your important documents, altogether

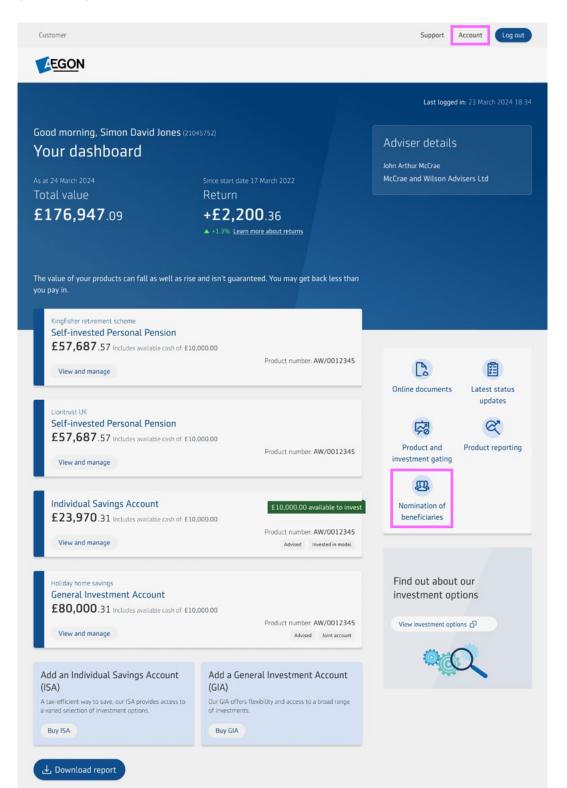
We keep all your important documents relating to your investments on ARC in one place on your dashboard. So if you're looking for your last statement or need the details of a specific application, you'll find it with the Online documents button.

EGON				
			Last logged in:	: 23 March 2024 18:34
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<sup>24 March 2024</sup> al value L <b>76,947</b> .09	Since start date 17 March 2022 Return +£2,200.36 A +1.3% Learn more about returns		n Arthur McCrae Crae and Wilson Advisi	èrs Ltd
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ndividual Savings Account 23,970.31 Includes available cash of: £10,0 View and manage	Onl	Line document ar documents are shown beto arch for specific documents.	ow. Use the filter to select	Filter
		Document Date	Product Product number	Туре
		Account Setup 09/08/2024	General Investment Account 75310967	Key Feature Documents
		Investment Confirmation 02/08/2024	Self-invested Personal Pension (drawdown) 72010967	
	ß	Switch Application Summary 01/10/2024	Self-invested Personal Pension (drawdown) 72081967	Illustration
	D	Annual Statement 05/07/2024	Self-invested Personal Pension 92010967	Illustration
				Contract Note Equities

#### Easily view and update your details

Use the **Account** section from the dashboard to select paperless communications and view and change the email address we have registered to your account. You can easily view and update your communication preferences.

It's important to check that the beneficiaries you've nominated on your account are correct. By using the Nomination of beneficiaries button on your dashboard, or going to your Account section, you'll be able to see your beneficiaries, and you can update them if needed.



### Transacting through your 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
- Change existing investments
- Manage regular money out
- One-off withdrawal

- Manage investment income (select whether to hold in cash, reinvest or pay as a lump sum)
- Equity trading

#### **Open a new Individual Savings Account (ISA)**

In your dashboard, you can select **Buy an ISA**.

To buy an ISA you'll need:

- To confirm your address, bank account and contact details.
- Details of any new bank account you're adding.

		Last logged in: 23 March 2024 1
Good morning, Simon David Jo Your dashboard	<b>DRES</b> (21045752)	Adviser details
As at 24 March 2024 Total value	Since start date 17 March 2022 Return	McCrae and Wilson Advisers Ltd
£176,947.09	+£2,200.36	
We don't include Other products in the	Total value and Return.	
The value of your products can fall as w you pay in.	ell as rise and isn't guaranteed. You may get back less than	
Kingfisher retirement scheme Self-invested Personal Pens £57,687.57 includes available of View and manage		Online documents Latest status updates
Self-invested Personal Pens £57,687.57 Includes available of View and manage		Product and Product reporting investment gating
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	punt (ISA) by to save and gives you access access to a range of different out more select Buy an ISA to begin. Capital at risk.	Nomination of beneficiaries
Buy an ISA		
🕹 Download report		Find out about our investment options

# Putting you in control

The different products and investments available sit within four levels - we call these gates. Each gate has a different level of access, and as you move up the gates it opens access to more product and investment options. You can sell an investment from any gate but need the correct level of access to buy. You and your adviser can agree on the right gate for you.

Before choosing to open a new gate, you'll be able to see which additional investments and products you'll be able to access. You'll also need to accept a declaration before actively choosing to move.

You should note that once you move into a new gate, you can't move back.

Below is a summary of the types of products and investments you can access from each gate. As you move up the gates, you'll be able to buy, transact and access products and investments in the earlier gates.

	Gate 1	Gate 2	Gate3 (current gate)	Gate 4 (financia adviser only)
New products you can buy				
General Investment Account, Individual Savings Account (ISA)		~	~	~
Self-invested Personal Pension				$\checkmark$
General Investment Account (gross), Self-invested Personal Pension (drawdown)				~
Products you can transact on (that you may have previously bought)				
Self-invested Personal Pension, Self-invested Personal Pension (drawdown)	$\checkmark$	$\checkmark$	~	~
General Investment Account, Individual Savings Account (ISA)		~	$\checkmark$	$\checkmark$
General Investment Account (gross), General Investment Account (Wealth Management Portfolio)				~
Investment types available				
Insured funds, lifestyle funds	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$
Open-ended investment companies (OEICs), Société d'Investissement à Capital Variable (SICAVs), unit trusts		~	~	~
Equities			$\checkmark$	~
Exchange-traded funds, investment trusts				~

#### Activating your account

If you have an email from us with a valid activation code, we'll ask you to set up your online access and create log in details including a password.

Then to add that extra layer of security if we don't already have your mobile number, and you're not already set up for two-factor authentication with us, we'll ask you to set this up. If you're already set up to use two-factor authentication for another account you have with us, you'll simply use the same details.

And then there's only one more step before your account is activated, update your communication preferences. You can select how you want to receive your documents and how you would like to be kept informed of our news, products and services that could be of interest to you or complement the products you already have. Once you've done that, that's you activated and you can log in to your acccount. After you've logged in, you can change your preferences at any time by accessing your Account from your dashboard.

If your activation code has expired, please speak to your financial adviser if you have one and they'll send you a new one. If you don't have a financial adviser, or if you have any problems activating your account, contact us and we'll be happy to help.

#### Not yet registered or activated?

If you've not registered or received an activation email, please contact your financial adviser in the first instance. If you don't have a financial adviser contact us and we'll be happy to help.

Customer 🗸		Support
EGON		Q. Search
Aegon UK		
Accessing your account online allows you to be in control.	Log in Email address	
You've got all the information about your products at your finger tips.	Password	0
	Forgotten password?	
	Not registered yet?	Set up online access
	Would you like to access our platform? Find out how to register 습기,	If you've been given an activation code you can set up your online access.

# To log in to your account visit: digital.aegon.co.uk/customer/authenticate/login

Although you'll have access to your own investments, your relationship with your adviser will stay the same. It's just that with the 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** 



aegon.co.uk 🛛 🖉 @aegonuk 🖬 Aegon UK

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