Aegon ISA transfer authority

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

In this form, Aegon means Cofunds Limited.

Use this form to transfer an ISA from another ISA account manager into an Aegon ISA. The Aegon ISA is a flexible ISA. This means when you make a withdrawal from your ISA you can replace it, in the same tax year, without it counting against your annual ISA allowance for the current tax year.

Important

You must send this form along with a completed and signed Aegon ISA transfer application form.

If you transfer from a Lifetime ISA (LISA) to an Aegon ISA, the LISA status for the transferred money will be lost along with any other benefits specific to the Lifetime ISA. As the Aegon ISA isn't a LISA, there may be a government charge applied to the amount transferred.

If you're transferring from multiple investment/plan managers, you'll need to send a separate transfer authority for each transfer.

All investment details entered in this form must match those held by the existing investment/plan manager. Any differences could cause delays to the requested transfer.

Please complete this form by typing in the boxes (excluding the signature box) and email it to: aegoncofundsadministration@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 so please consider this and do not include any personally sensitive, financial or banking information that has not been appropriately secured.



Please list all investments held with the investment/plan m to sell into cash and transfer to Aegon or tick the sell all bo the Aegon ISA transfer application form to tell us which inv to reinvest into. Account reference with the existing investment/plan manag	x below. Please also complete section 2 of estments, including sedol codes, you'd like
Sell all my investments	
Full investment manager name and investment name	Sedol code (this is shown in your Key Investor Information Documents (KIID))
Tax year subscriptions to be transferred	
Tax year subscriptions to be transferred You can transfer your existing ISA savings into an ISA with use savings from previous years but if you want to transfer any confull current year amount as we don't support the partial trandoes not affect your annual ISA allowance. You can transfer	current year savings, you'll have to transfer the asfer of current year subscriptions. Transferring
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1.

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Account or plan number (this must be completed)

4. Authorisation

Aegon ISA number (if applicable)	
8	
I authorise the ISA account manager named on this authorise the ISA account manager named on this authorise requested to Cofunds Nominees Ltd with immedia of a notice period, and email the proceeds as specified by Aegon Cofunds Administration, Sunderland SR43 4DN, a required by them to allow them to accept this transfer.	te effect or where I so instruct at the end elow to my new Aegon ISA account manager at:
You should sign and date this form below.	
Your full name	Name of existing investment/plan manager
Date	Existing investment/plan manager address
Signature	
X X	·
	Postcode



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