

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**.

The screenshot displays the Aegon dashboard interface. At the top, there are navigation links for 'Investments', 'Help and Support', 'Profile', and 'Sign out'. The main heading is 'Investments' with a user ID and last sign-in time. A summary card shows 'Your total investments £3,557,984.67 as of 01 August 2021' with a donut chart showing the breakdown: GIAs (91.79%), Pensions (6.75%), and ISAs (1.46%). Below this is a warning about investment returns. Two product cards are shown: 'Stocks and Shares ISA' (£51,857.72) and 'General Investment Account (GIA)' (£3,265,952.35). A 'View & Manage' button is highlighted on the Stocks and Shares ISA card. An inset window shows the 'Overview' tab for the Stocks and Shares ISA, displaying the 'Tax year allowance limit' (£18,500.00) and a 'Your investments' donut chart with the following breakdown: Fundsmith Equity I Acc (38.12%), VT Chelsea Mgd Aggr Gth A Acc GBP (19.70%), Marlborough UK Micro Cap Gwth P Acc (19.04%), GS India Eq PR R GBP (14.36%), Artemis Global Income I Inc (8.78%), and Cash (0.00%). The valuation is as of 09 September 2019.

## 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 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.



Take a look at our [guide to transaction history](#) for more details.

The screenshot shows the AEGON Stocks and Shares ISA 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 'Stocks and Shares ISA'. Below this, the current balance is displayed as £51,857.72, with a note that it includes £4.79 of available cash, as of 02 August 2021. There are three main action buttons: 'Top up', 'Switch funds', and 'Manage regulars', along with a 'More options' dropdown. Below these buttons, the account number 'Aegon - 80949998' and the intermediary 'Donald Adviser 609591' are shown. 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.' Below the disclaimer are three tabs: 'Overview', 'Transactions' (which is highlighted with a pink box), and 'Documents'. On the right side of the dashboard, there is a 'Help & Support' section with four FAQ items: '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?', and 'What do all the different transaction types mean?'. At the bottom of the right sidebar is an 'Intermediary details' dropdown menu. The 'Transactions' section features a summary bar with 'In' at -£40,015.62 and 'Out' at £0.00, and a 'Filter (5)' and 'Download' option. Below this is a table of transactions:

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	

## All your important documents, altogether

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.

The screenshot shows the Aegon Stocks and Shares ISA dashboard. At the top, there's a navigation bar with 'Investments', 'Help and Support', 'Profile', and 'Sign out'. The main header displays 'Stocks and Shares ISA' and user information: 'Ind12602First Name, Ind26136 Last Name' and 'Last signed in - 16:16 BST 06/07/21'. The central panel shows a balance of £51,857.72 as of 02 August 2021, with £4,759 available cash. Below this are buttons for 'Top up', 'Switch funds', and 'Manage regulars', along with a 'More options' dropdown. 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 at the bottom of the main panel has 'Overview', 'Transactions', and 'Documents' (highlighted with a pink box). Below this, a message says: 'Here are your most recent personal documents. Please [call us](#) if you've any older documents you need to access.' A search bar is labeled 'Search table'. A table lists documents:

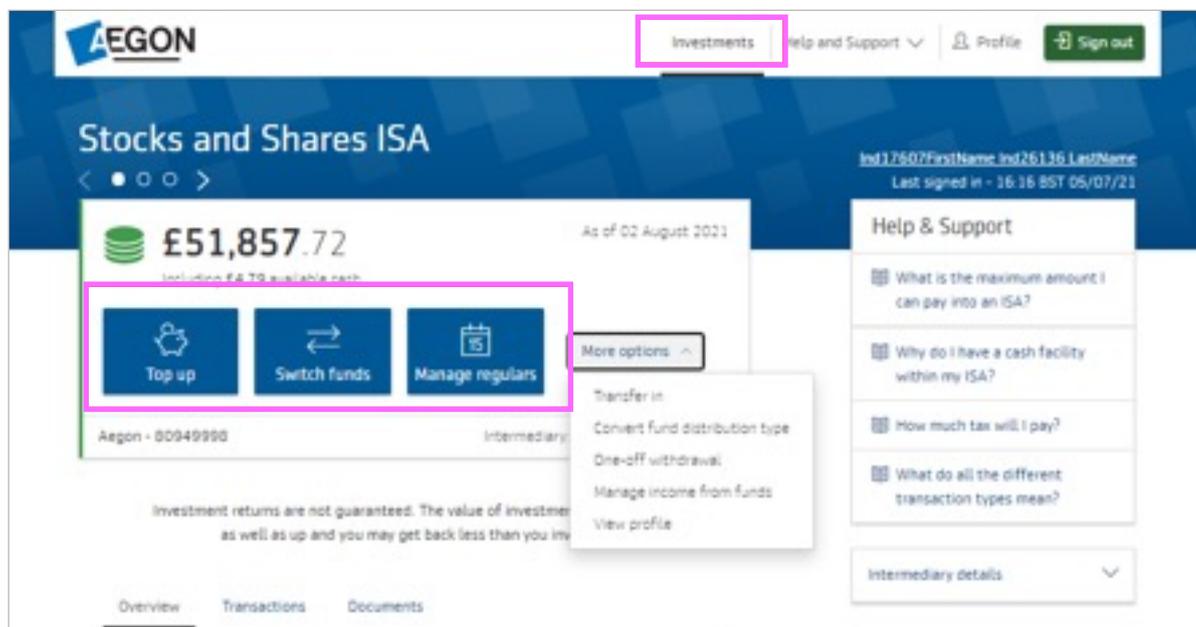
Date	Document	Type
04/06/20	Confirmation of Application (PDF 169 KB)	Setup
04/06/20	Application Summary (PDF 62 KB)	Setup
04/06/20	Illustration (PDF 133 KB)	Setup
04/06/20	Key Features Document (PDF 76 KB)	Setup

At the bottom of the table, there is a 'View more' button and a dropdown showing '25 documents'.

## 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)



The screenshot displays the Aegon dashboard for a Stocks and Shares ISA. The top navigation bar includes the Aegon logo, a highlighted 'Investments' menu, and links for 'Help and Support', 'Profile', and 'Sign out'. The main content area shows the ISA balance as £51,857.72, with a 'More options' dropdown menu open, listing actions like 'Transfer in', 'Convert fund distribution type', 'One-off withdrawal', 'Manage income from funds', and 'View profile'. A 'Help & Support' section is also visible on the right.



### 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://customerdashboard.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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