



For financial advisers only

# Changing your client's retirement age

## Aegon Retirement Choices and One Retirement



# Changing your client's retirement age

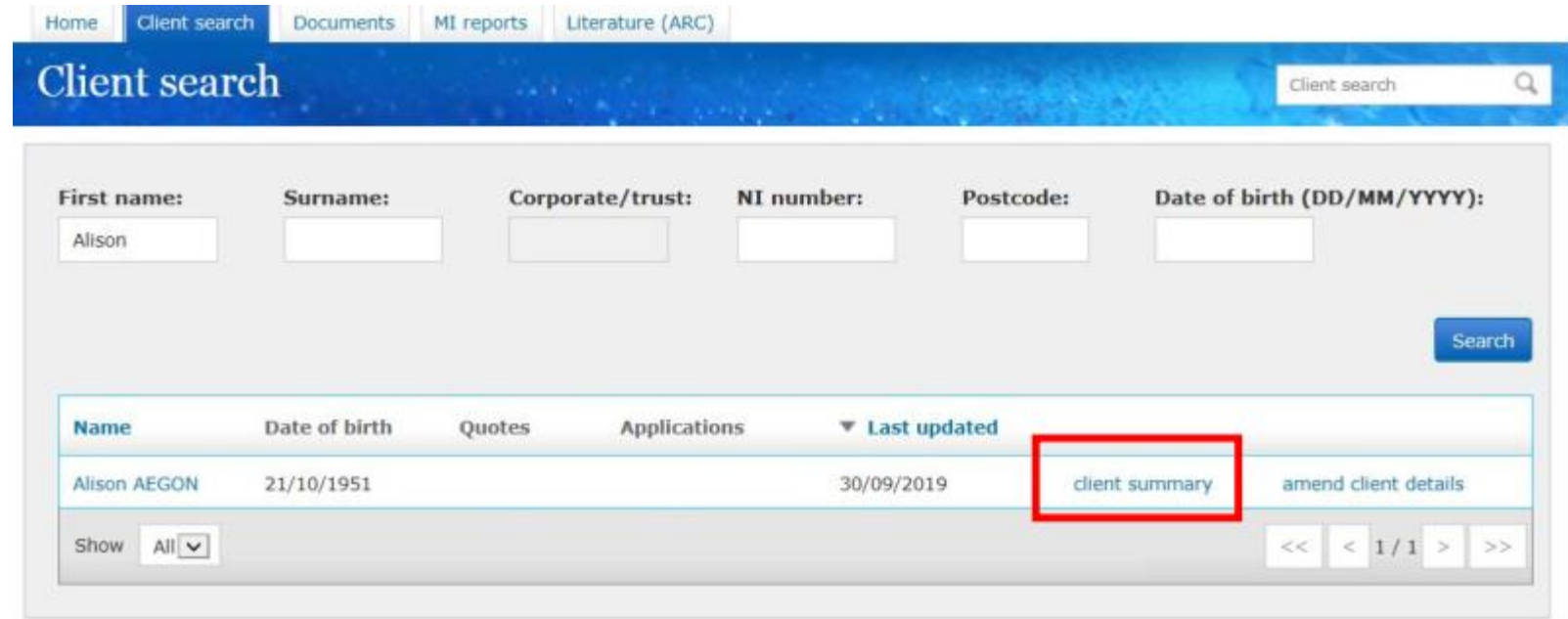
This guide explains how to change the retirement age for your Aegon Retirement Choices (ARC) and One Retirement clients.

For further support when using ARC or One Retirement, see our full range of [Online support guides](#).

The screens we show are for demonstration purposes only.

# Changing your client's retirement age – find your client

- Sign in and find your client. Our [Using ARC and One Retirement guide](#) shows you how to do this.
- Once you find your client, select **Client summary**.



The screenshot shows the AEGON Client search interface. At the top, there are navigation tabs: Home, Client search (selected), Documents, MI reports, and Literature (ARC). Below the tabs is a blue header with the text 'Client search' and a search input field containing 'Client search' and a magnifying glass icon. The main search area contains several input fields: 'First name:' with 'Alison', 'Surname:', 'Corporate/trust:', 'NI number:', 'Postcode:', and 'Date of birth (DD/MM/YYYY):'. A blue 'Search' button is located to the right of these fields. Below the search fields is a table with the following columns: Name, Date of birth, Quotes, Applications, Last updated, and two action links. The table contains one row for 'Alison AEGON' with a date of birth of '21/10/1951' and a last updated date of '30/09/2019'. The 'client summary' link in the action column is highlighted with a red box. Below the table, there is a 'Show' dropdown menu set to 'All' and pagination controls showing '<< < 1 / 1 > >>'. The AEGON logo is visible in the bottom right corner of the page.

Name	Date of birth	Quotes	Applications	Last updated		
Alison AEGON	21/10/1951			30/09/2019	client summary	amend client details

# Changing your client's retirement age – client summary

- From the **Client summary**, select the product you want to change the retirement age for.

The screenshot displays the AEGON Client Summary interface. The top navigation bar includes 'Home', 'Client search', 'Documents', 'MI reports', and 'Literature (ARC)'. The main header shows 'Client summary' and 'Alison AEGON (211809)'. A sidebar on the left lists various services like 'Transactions', 'Pensions quote and apply', and 'Research and analysis'. The main content area shows 'Account details' and 'Income details' tabs. A table of assets is displayed with columns for 'Value at 30/03/2019', 'Value at 30/09/2019', 'Money in', 'Money out', 'Change in value', and '% change'. The row for 'AEGON SIPP Uncrystallised - 703988' is highlighted with a red box.

	Value at 30/03/2019	Value at 30/09/2019	Money in	Money out	Change in value	% change
Online assets	£36.43	£11.14	£0.13	£26.26	£0.84	8.16%
Pension	£36.43	£11.14	£0.13	£26.26	£0.84	8.16%
<b>AEGON SIPP Uncrystallised - 703988</b>	£36.43	£11.14	£0.13	£26.26	£0.84	8.16%
AEGON SIPP Drawdown Flexi-access - 703988	£0.00	£0.00	£0.00	£0.00	£0.00	0.00%
AEGON SIPP Uncrystallised - 71840254	£0.00	£0.00	£0.00	£0.00	£0.00	0.00%
ISA	£0.00	£0.00	£0.00	£0.00	£0.00	0.00%
AEGON Stocks and Shares ISA - 71716835	£0.00	£0.00	£0.00	£0.00	£0.00	0.00%
Offline assets		£125,000.00				
test		£15,000.00				
g		£100,000.00				
Fiat 500		£10,000.00				

Download report

# Changing your client's retirement age – wrapper summary

- Under Transactions – select Preferred retirement age

**Wrapper summary** AEGON Alison

Wrapper summary - Alison AEGON - AEGON SIPP Uncrystallised

Balance as at 19/11/2019

Date:

Portfolio name	Unit/shares	Price	Value	Current balance %	Default investment strategy %
Cash	4.430000	£1.000000	£4.43	40.09%	0.25%
3I Infrastructure Plc Ord NPV	1.000000	£2.920000	£2.92	26.43%	
BMO Priv Eq Tst	1.000000	£3.695000	£3.70	33.48%	
Rathbone Ethical Bond I Acc	0.000000	£2.234200	£0.00		10.00%
Rathbone Ethical Bond I Inc	0.000000	£1.008500	£0.00		20.00%
Rathbone Global Opp I Acc	0.000000	£2.539200	£0.00		20.00%
Rathbone Income I Acc	0.000000	£16.635600	£0.00		39.75%
Rathbone Strategic Bond I Inc	0.000000	£1.152100	£0.00		5.00%
Rathbone Stratgc Gth Pfl S Inc	0.000000	£1.535100	£0.00		5.00%

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Transactions

- Top up
- Maintain investment strategy
- Switch into assets
- Drawdown-Lite
- Drawdown-Pro
- Ad hoc adviser charge
- Ongoing adviser charge
- Specialised quotes
- Product and investment information
- Preferred retirement age**
- Equity trading
- Maintain distribution choices

Research and analysis

- Asset selector
- CGT reporting tool
- Fund charting
- Portfolio scanner
- Portfolio performance review
- Model portfolio evaluator

# Changing your client's retirement age – retirement age

- Update the **Preferred retirement age**.
- Select **Submit**.

This may cause an internal fund switch to occur, if your client is invested in a lifestyle fund.

Home Client search Documents MI reports Literature (AOR)

## Preferred retirement age

AEGON SQI Test Annabel

### Preferred retirement age

Please be aware that changing your preferred retirement age will impact your available fund at retirement. If you invested in a lifestyle fund changing your retirement age may also impact your investment mix.

Preferred retirement age: 70

Back to wrapper summary Submit



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