



For financial advisers only

Maintaining the distribution choice

Aegon Retirement Choices and One Retirement



Maintaining the distribution choice

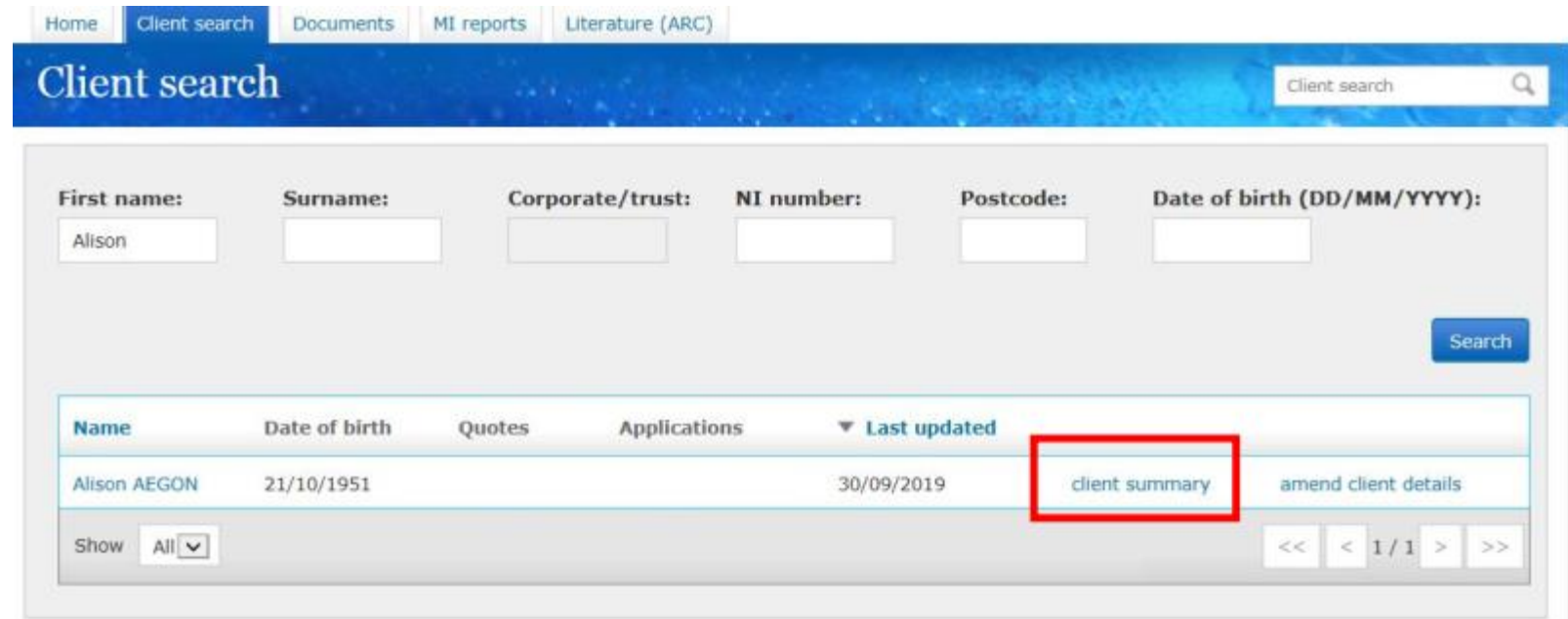
This guide explains how to amend the distribution choice for your Aegon Retirement Choices (ARC) and One Retirement clients.

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.

Maintaining the distribution choice – 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 displays the 'Client search' page in the AEGON system. At the top, there is a navigation bar with tabs for 'Home', 'Client search', 'Documents', 'MI reports', and 'Literature (ARC)'. Below this is a search bar with the text 'Client search' and a magnifying glass icon. The main search area contains several input fields: 'First name:' (with 'Alison' entered), 'Surname:', 'Corporate/trust:', 'NI number:', 'Postcode:', and 'Date of birth (DD/MM/YYYY):'. A 'Search' button is located to the right of these fields. Below the search area is a table with the following columns: 'Name', 'Date of birth', 'Quotes', 'Applications', and 'Last updated'. 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'. To the right of the table, there are two links: 'client summary' (which is highlighted with a red box) and 'amend client details'. At the bottom of 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.

Maintaining the distribution choice – client summary

- From the **Client summary**, select the product you want to maintain the distribution choice for.

The screenshot shows the AEGON client summary page for Alison AEGON. The 'Client summary' tab is highlighted in red. The table below shows the distribution choices for the account.

	Value at 23/03/2019	Value at 23/09/2019	Money in	Money out	Change in value	% change
Online assets	£36.47	£11.25	£0.15	-£26.26	£0.89	8.59%
Pension	£36.47	£11.25	£0.15	-£26.26	£0.89	8.59%
AEGON SIPP Uncrvstallised -	£36.47	£11.25	£0.15	-£26.26	£0.89	8.59%
AEGON SIPP Drawdown Flexi-access -	£0.00	£0.00	£0.00	£0.00	£0.00	0.00%
AEGON SIPP Uncrvstallised -	£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	£0.00	£0.00	£0.00	£0.00	£0.00	0.00%

Maintaining the distribution choice– wrapper summary

- Under **Transactions** – select **Maintain distribution choices**

Home Client search Documents MI reports Literature (ARC)

Wrapper summary

AEGON Alison

Wrapper summary - Alison AEGON - AEGON SIPP Uncrystallised

Balance as at 23/09/2019

Date: 23/09/2019 [Go](#)

Portfolio name	Unit/shares	Price	Value	Current balance %	Default investment strategy %
Cash	0.910000	£1.000000	£0.91	8.09%	0.25%
3I Infrastructure Plc Ord NPV	1.000000	£2.980000	£2.98	26.49%	
Aegon Merian Gbl Strat Bd (ARC) Pn	0.000000	£1.160749	£0.00		5.00%
BMO Priv Eq Tst	1.000000	£3.630000	£3.63	32.27%	
Scot Eq 50/50 CautMgd Clc Pn (ARC)	0.000000	£1.926546	£0.00		50.00%
Scot Eq 60/40 Caut Mgd Clc Pn (ARC)	0.000000	£1.847069	£0.00		20.00%
Scot Eq 70/30 Def Mgd Clc Pn (ARC)	0.000000	£1.768678	£0.00		24.75%
TB Guinness Global Energy I Acc	10.218000	£0.364700	£3.73	33.16%	

<< < 1 / 1 > >>

[Download report](#)

Maintaining the distribution choice – distribution option

- For each asset we show, select the **Preferred distribution option**
- You can select from:
 1. Remain in cash;
 2. Reinvest in fund, or
 3. Pay out as consolidated natural income (available for GIAs and ISAs only).
- To continue with your request, select **Submit**. Any amends to the distribution choice are instant.

Home Client search Documents MI reports Literature (ARC)

Maintain distribution choices

Asset search

Maintain distribution choices - Ms Alison AEGON, AEGON SIPP Uncrystallised

Task information

Once you complete and submit this page, you're giving us instructions on how we're to treat any income received in connection with the asset. A different preferred distribution option can be selected for each asset. If 'pay out distribution income' is selected, please make sure you complete the 'Natural Income Payment Details' section. We'll pay any consolidated natural income to this nominated bank account. Visit www.aegon.co.uk/incomechoice to find out more about your options.

Asset name	Preferred distribution option
3I Infrastructure Plc Ord NPV	Remain in cash
BMO Priv Eq Tst	Remain in cash

Show All

<< < 1 / 1 > >>

Back to account summary Submit



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