For financial advisers only

Ad hoc income

Aegon Retirement Choices and One Retirement

Ad hoc income

This guide explains how to process a single one-off income payment from a self-invested personal pension (SIPP) drawdown wrapper for your clients on Aegon Retirement Choices (ARC) and One Retirement.

The standard timescale for an ad hoc income payment is **11 working days**.

It can take seven days for the assets to settle into cash if a sell down is needed, two days for the payment to be processed and then a further two days to be accepted by your client's bank as a FastPay payment.

Please be aware these timescales are subject to change.

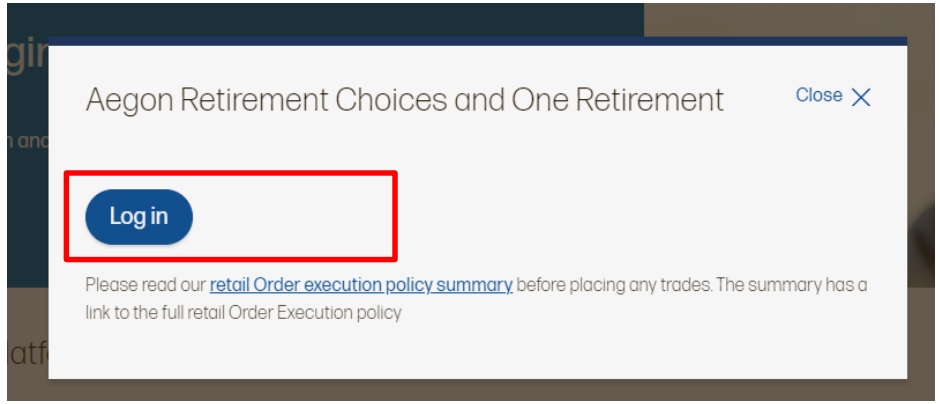
The screens shown are for demonstration purposes only.

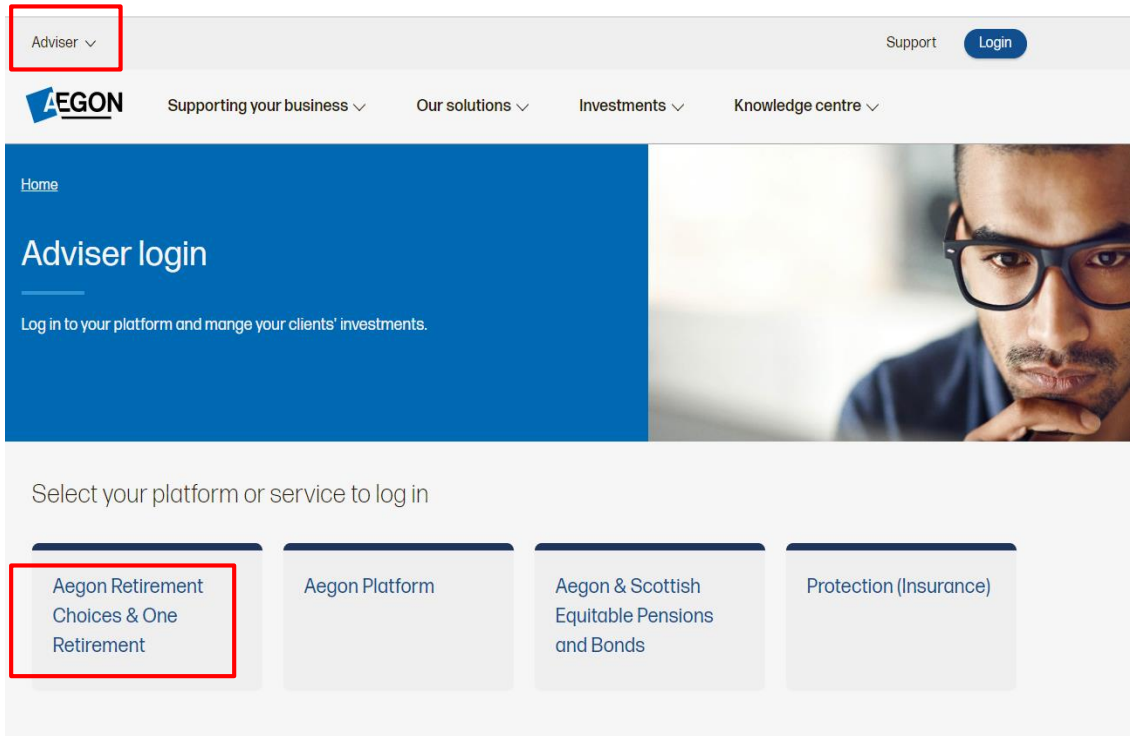
Logging into ARC and One Retirement

1. Go to **aegon.co.uk/adviser/login**

2. Then select **Aegon Retirement Choices (ARC) & One Retirement**, as shown to the right.

3. On the following page select **Login**, as displayed below.





Logging into ARC and One Retirement

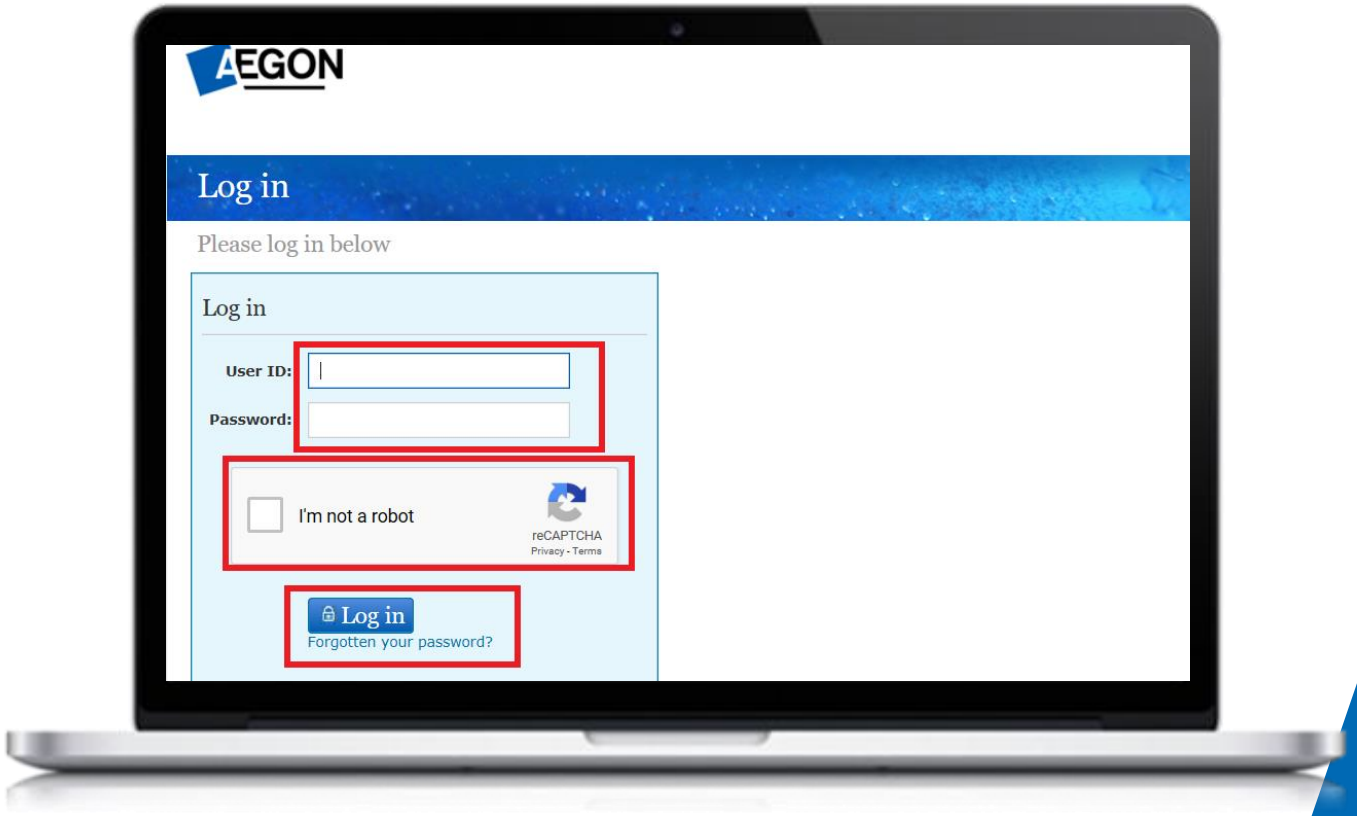
5. Enter your 8 digit **user ID** and **password**.

   You can find your **user ID** in the original pending activation email we sent you.

6. Confirm you're not a robot. You might be asked to select the images on the login screen.

7. Then select **Log in.**

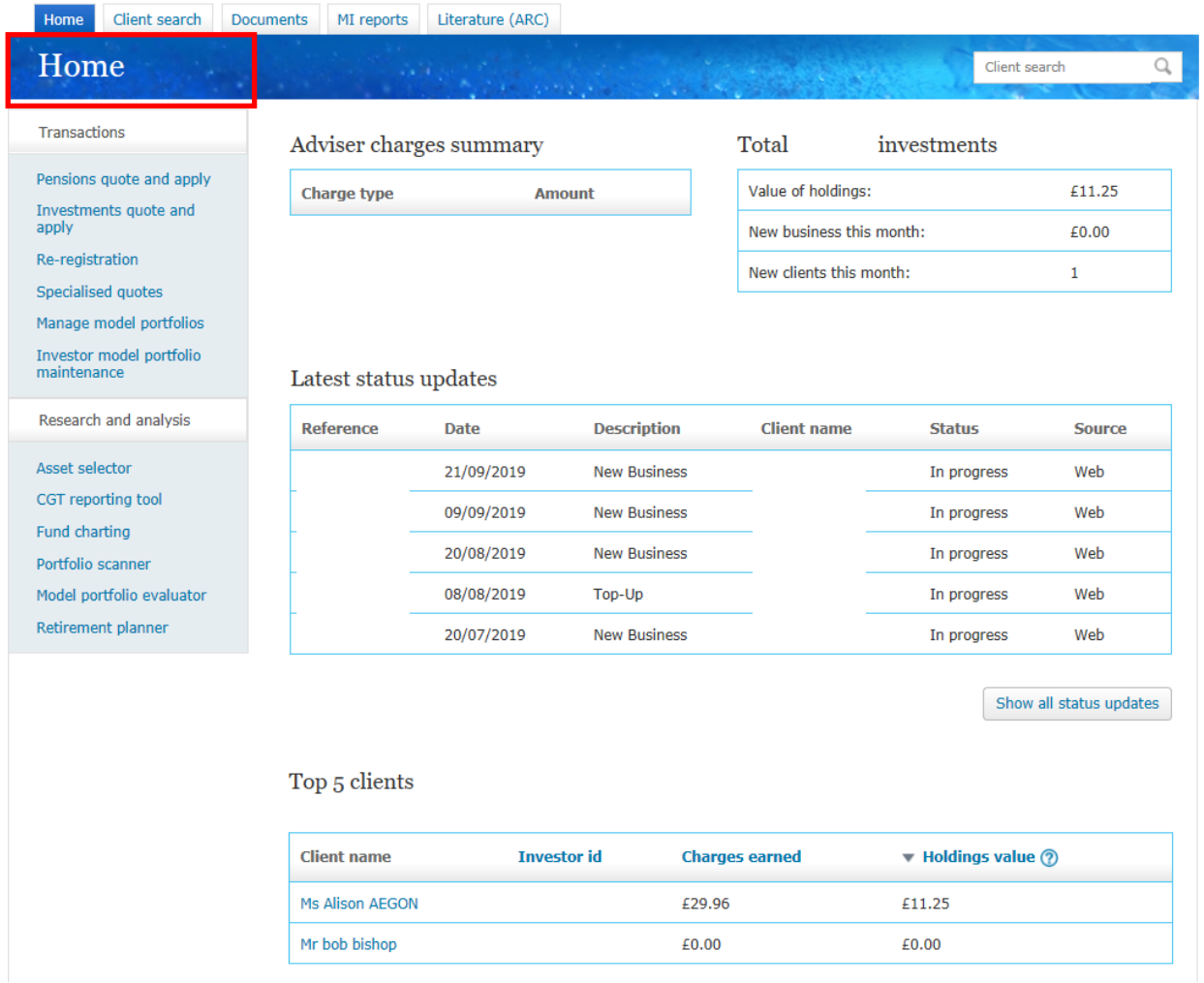
If you've forgotten your password select **Forgotten your password?**



Finding your client

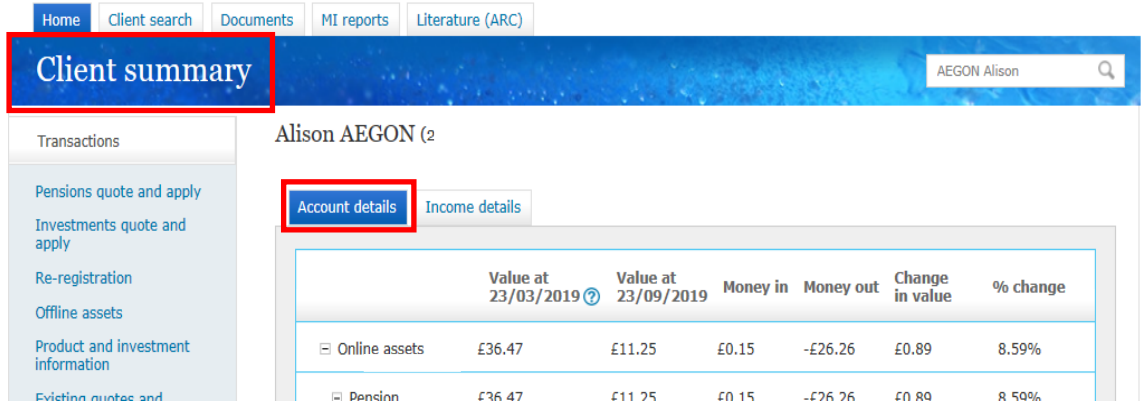
Once you've logged in, you'll see the **Home** page.

You can then search for the relevant client using **Client search** above **Home** or in the search box in the top right.

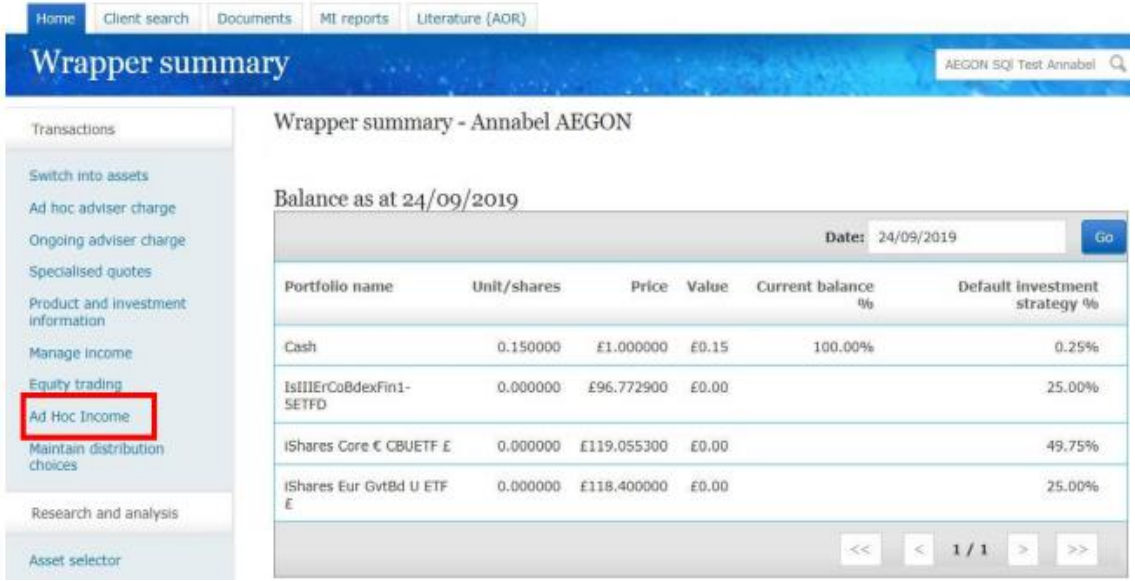


Finding the right wrapper

Once you've found the relevant **Client summary**, select the relevant wrapper displayed under **Account details.**



Under **Wrapper summary** select **Ad Hoc Income**.



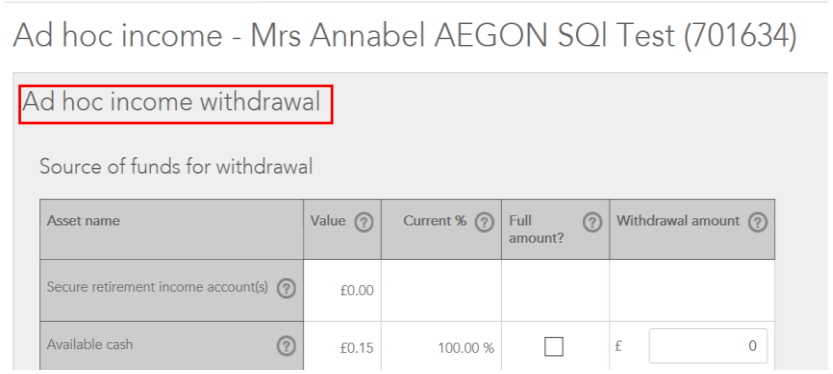
Completing the ad hoc income withdrawal

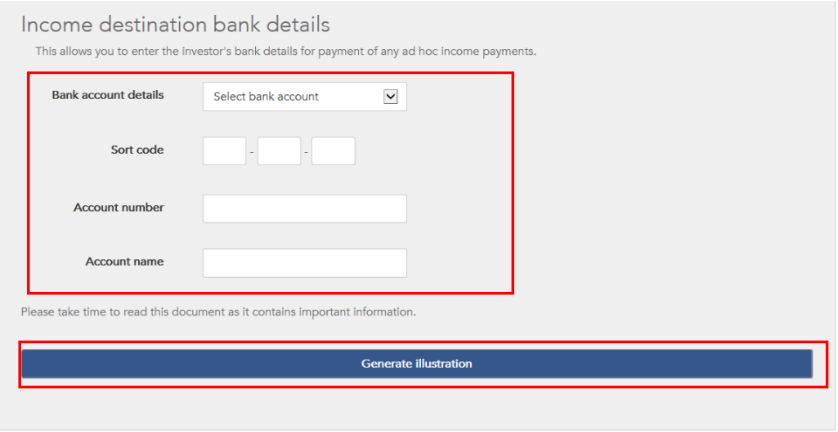
You'll now see the **Ad hoc income withdrawal** screen.

You have to choose the assets you wish to disinvest from to allow the income payment to be made.

At the bottom of this page, please enter the **bank details** you want the income to be paid to.

You now need to **generate an illustration**, then select **Next** to progress.



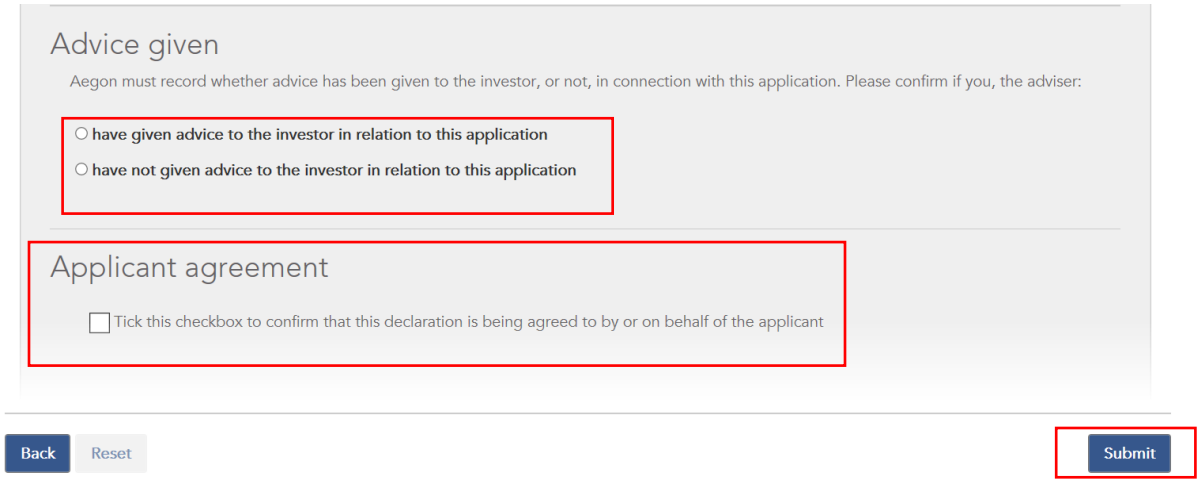


Completing the ad hoc income withdrawal

Declaration and Submit is the final page of the process.

We'll try to verify the bank details you entered electronically – if we're not able to do this, we may ask you for further documentation or confirmation.

Confirm whether you've given advice to your client or not, then confirm the declaration has been agreed to by your client, before submitting.



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