

For advisers only

Recurring switch from cash instruction

You should use this instruction to request a recurring switch from the Cash facility only. If you want to request a recurring switch for more than one product please complete a separate instruction for each. Once completed please return this instruction to clientsupport@arc.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. Please consider this when sending us sensitive information.

You can't use this form for Secure Retirement Income.

Please complete this form in BLOCK CAPITALS and ballpoint pen.

Product to apply a recurring switch to

Plan number

Starting on the* 9th or the 22nd
of (mm/yyyy)

with the last switch to take place on (mm/yyyy)

*If no start date is provided above, we'll start this instruction at the next recurring switch date.

1. Investor details

Account number

Investor name(s)

2. Recurring switch instruction

Please write the investment names in full as shown in the Aegon investments list.

We won't include non-daily dealing funds, alternative investments or equities traded through the stockbroking service (where applicable) in the recurring switch process. If you want to change the level of investment in these asset types, you can do this online.

Any existing rebalancing instruction won't be affected by this instruction.

Recurring switch from cash

I want to switch

£ from the cash facility to the investments listed below.

Frequency (select one)

monthly quarterly annually

If applicable, this will replace any existing instructions. We'll only apply this instruction to cleared funds within the cash facility. In the event of the cash facility's value falling below any minimum that you may be required to hold in the cash facility, an automated process may mean the assets purchased by this recurring switch are sold to rebalance the cash holding to the required level.

There must be sufficient cleared funds within your cash facility to cover the total amount below. If there isn't, the instruction won't be placed and we'll contact you for further information.

Name of investment(s)	Sedol	Amount (£)
	Total*	

*The total for all the named investments must be the same as the overall switch amount shown above.

3. Adviser details

Name of adviser or registered individual

Name of firm

Address of firm

<input type="text"/>
<input type="text"/>
<input type="text"/>
Postcode

Financial Services Register number

I declare that in the absence of a discretionary management agreement for the client, this instruction has been authorised by the client before being submitted.

Or

I declare that the above instruction is given in accordance with a current discretionary management agreement for this client.

No adviser charge is payable for recurring switches.

Date (dd/mm/yyyy)

Name (print)

Adviser signature (No signature required if sending this form by email.)

X	X
---	---



Aegon is a brand name of Scottish Equitable plc (No. SC144517) and Aegon Investment Solutions Ltd (No. SC394519) registered in Scotland, registered office: Edinburgh Park, Edinburgh, EH12 9SE. Both are Aegon companies. Scottish Equitable plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Aegon Investment Solutions Ltd is authorised and regulated by the Financial Conduct Authority. Their Financial Services Register numbers are 165548 and 543123 respectively.

© 2020 Aegon UK plc

MULT377109 03/20