

# Recurring switch from cash instruction

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio version of this document, please call 03456 081 680 (call charges will vary) or visit [aegon.co.uk/additionalsupport](https://aegon.co.uk/additionalsupport)

For a Junior Self-invested Personal Pension (Junior SIPP), in instances where references to 'you', or 'your' appear within this document, this refers to the Member of the Junior SIPP whilst addressing the Registered contact on the Junior SIPP responsible for the administration and management of the Junior SIPP on the Member's behalf. Where references to 'I' or 'me' appear within this document, this refers to either the Registered contact, authorised to make declarations on behalf of the Member of the Junior SIPP or the Child themselves if the context otherwise requires.

You should complete this form if you'd like to switch from cash to investment funds within your product on a recurring basis or cancel an existing recurring switch. If you want to request a recurring switch for more than one product please complete a separate instruction for each.

Please complete this instruction by typing in the boxes, including the signature box and email it to: [clientsupport@arc.aegon.co.uk](mailto: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 and don't include any personally sensitive, financial or banking information that hasn't been appropriately secured. If you have access to our online services, you may be able to log in and complete your action securely.

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

## 1. Customer details

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Customer number

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Customer forename(s)


Customer surname


Registered contact forename(s)  
(for Junior products)


Registered contact surname  
(for Junior products)


## 2. Recurring switch instruction

2.1 Product to apply or remove to

Product number

2.2 ☐ I wish to cancel the existing recurring switch instruction - please complete sections 3, 4 and 5 as applicable.

2.3 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.

2.4 Please write the investment names in full as they appear in the Fund Research Centre online ([aegon.co.uk/fundchoice](https://aegon.co.uk/fundchoice) and click on the ARC tile).

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 ☐ yearly

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

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Name of adviser or registered individual

Name of firm

Address of firm

  
  
  

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.

### 4. Adviser declaration

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Where you have completed this instruction on behalf of the customer named in section 1, when you sign the form, by typing your name in this box or using another electronic signature method we have previously agreed in writing with you that you may use, you are making the declarations and confirming that the customer wishes to proceed with the instructions in this form.

By signing this instruction, by typing your name in the box below or using such other agreed electronic signature method, you make the following additional declarations:

You declare that:

- To the best of your knowledge and belief, the information supplied to Aegon on behalf of the customer is true and complete
- You have the appropriate authority from the customer, or Registered contact for Junior products, to complete this form, to make the declarations in this form on their behalf and to provide Aegon with the instructions set out in this form, acknowledging that Aegon reserves the right to request a copy of the authority and failure to provide a copy when requested may result in Aegon being unable to proceed with the instructions
- You have discussed the form with the customer, or Registered contact for Junior products, and they are aware of its content, they agree to the declarations and agree to you submitting this application on their behalf

You hereby indemnify:

- Aegon against all claims, losses, tax charges, penalties and interest incurred or due to be paid by Aegon as a result of your failure to obtain the appropriate authority from the customer, or Registered contact for Junior products, and/or supplying incorrect or inaccurate information and Aegon relying on and following the instructions given in this form

Date (dd/mm/yyyy)

Signature (type name here)

## 5. Customer declaration

- 5.1** I instruct Aegon to carry out the recurring switch into the cash facility of the product set out in section 2 of this form from the investment(s) listed in section 2 in accordance with the terms and conditions of the product listed in section 2.

**5.2** I have had the opportunity to read the Key Investor Information Document(s) (KIIDs), (or Key Information Document) and any relevant consumer-facing sustainability disclosure reports relating to the fund(s) I would like to switch from (listed in section 2 of this form) and to before completing this instruction form.

**5.3** I have had the opportunity to speak to a financial adviser before completing this instruction form.

**5.4** I understand that this instruction replaces all previous instructions that I (or any previous Registered contact for a Junior product), have given for this product.

Date (dd / mm / yyyy)

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Signature (type name here)

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