

For customers

Change of investor details

Once completed, return this form and any additional information to Platform Client Services, Aegon, Edinburgh Park, Edinburgh, EH12 9SE.

Please complete in **BLOCK CAPITALS** and in ballpoint pen.

1. Current details (as currently held by Aegon)

Investor number

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If you have a joint plan (only available for Aegon Retirement Choices investors), please provide your joint investor number.

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Full forename(s)

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Surname

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2. Change of personal details

You only need to complete fields where your details have changed.

New name

Title

Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

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Surname

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Enclose a certified copy of the :

- Deed poll
- Marriage certificate
- Decree absolute of divorce
- Civil partnership certificate

Other

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For information on who can certify a document, go to aegon.co.uk/certify

Whenever you see this icon , we're asking you to send us additional material with this form.

New residential address*

Postcode

New correspondence address*

All correspondence will be sent to this address if provided.

Postcode

*Please send us adviser certified evidence of the change of address.

2. Change of personal details – continued

New contact details

Home phone number

Work phone number

Mobile phone number

Fax

Email

Change of UK tax residency or UK relevancy status

- Change of UK residency status – enclose the relevant R85 form confirming the changes ☒.
- Change of UK relevancy status – enclose the relevant documentation form confirming the changes ☒.

3. Client declaration

To the best of my knowledge and belief, the information I've supplied in this form, is true and complete.

Date

D	D	M	M	2	0	Y	Y
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Print name

Signature

If you have a joint plan (only available for Aegon Retirement Choices investors), please provide signatures of all investors.

Date

D	D	M	M	2	0	Y	Y
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Print name

Signature (if applicable)

Date

D	D	M	M	2	0	Y	Y
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Print name

Signature (if applicable)

Date

D	D	M	M	2	0	Y	Y
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Print name

Signature (if applicable)

