For customers

Contribution alteration instruction

Please read these notes before completing this form

How to use this form
This form should be used when regular contributions to an existing Aegon Stakeholder Pension Plan, Personal Pension Plan or Flexible Pension Plan are being increased or decreased.

It should also be used when adding an additional single contribution to any of these plans. If there are any other changes then use the Plan alteration form.

You must refer to the ’Contribution alteration instruction notes’ at the back of this form when completing this supplementary application form.

This instruction and the answers you give will affect the contract of insurance which you currently have with Aegon. These changes may be invalid in the event of a claim arising if you’ve failed to disclose any material fact (that’s any fact which would be likely to influence the assessment and acceptance of this application) that the form asks for. If you’ve any doubt as to the significance of any fact then you should disclose it. You should check that the form is fully completed and the information in it is accurate and complete. This is extremely important, particularly if the information has been collected by a financial adviser using information supplied by you, as this document alters the basis of a contract between you and Aegon. If any details are incorrect or incomplete, amend the details, initialling any changes, and contact a financial adviser.

This form is submitted to Aegon as your instruction to alter your existing pension plan.

Part A – Contribution alteration instruction

1. Personal details

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

Full forename(s)

Address

Surname

Existing Aegon plan number

Postcode
2. Contributions

Enter the information relating to the change in contributions (see note 1 on the back page of this form).

The government sets an upper limit or annual allowance on the amount you can save into your pension plan each year without incurring a tax charge. The annual allowance is measured across all registered pension plans you may have. From 9 July 2015 the rules in relation to the annual allowance changed. 2015/16 is a transitional year, please speak to a financial adviser for more information. For the 2016/17 tax year the annual allowance will be £40,000.

2.1 Give the date you want the new contributions to start (mm/yyyy)

2.2 How much do you now want to contribute?

- £ __________ gross regular contribution
- £ __________ gross single contribution

2.3 How much will your employer now contribute to your plan?

- £ __________ gross regular contribution
- £ __________ gross single contribution

2.4 Future contributions

If you want regular contributions to increase automatically each year, indicate below by how much they’ll increase.

- [ ] At a fixed rate of __________% a year (maximum 15%)

or

- [ ] At a rate in line with Average Earnings (with a minimum of 5% a year and a maximum of 15% a year)

3. Investment choice

How would you like your new contributions invested (see note 2 on the back page of this form)?

Please tick one option.

- [ ] the same
- [ ] differently – provide details in table below

<table>
<thead>
<tr>
<th>Regular contributions</th>
<th>Single contributions</th>
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<tr>
<td>Fund name(s)</td>
<td>%</td>
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4. Declaration and consent

In this declaration and consent, 'I' means the person applying for the plan and 'you' means Aegon.

4.1 I acknowledge that any increase in regular contributions and any additional single contribution will be invested in the same fund or funds as current contributions, if the table in section 3 of this form isn’t completed. In certain circumstances further information may be required.

4.2 I declare that, to the best of my knowledge the details I’ve given in this form, whether in handwriting or not, is correct and complete.

Date (dd/mm/yyyy)

Signature of applicant

For financial advisers only

For the purposes of Financial Conduct Authority reporting:
Did you give this applicant advice when deciding to alter their existing plan?

☐ Yes  ☐ No

Part B – Contribution alteration instruction notes

How to use this form

1 Contributions
Enter the total new gross contributions you and/or your employer want to make to your plan.
Personal contributions will be paid net of basic rate tax.
Net personal contributions include any contributions made on your behalf by a third party, other than your employer.
Any single contributions will be applied to your plan on the date they’re received.
If an employer is increasing contributions, provide written confirmation of this from the employer.

2 Investment choice
The investment funds chosen will be the future fund split for your total gross regular contributions. If you want to switch your existing funds into different investment funds, you must complete the Alteration of fund choice form.
You should indicate the funds required and the investment split. You should enter the exact fund name (as detailed in our fund list available at aegon.co.uk/funds).
Where a clear and complete investment choice is made, we’ll invest the contribution(s) in accordance with that choice. Where no clear and complete investment choice is made, we’ll invest the contribution(s) in accordance with our Investment fund allocation procedure, which is available on request.