

# Discretionary fund management fee instruction

You should complete this instruction to request that a discretionary fund management fee is set up against each of the investor's wrappers listed on the form or as listed in the bulk model switch spreadsheet. Email completed instruction to [clientsupport@arc.aegon.co.uk](mailto:clientsupport@arc.aegon.co.uk)

Our email system and the way we deal with data is internally secure. However we're unable to ensure the security of emails before they reach us. Please consider this when sending sensitive information.

## 1. Discretionary fund management (DFM) details

Name of DFM firm fees to be paid to

Financial services register number of DFM Firm

## 2. Investor details

List investor details here or attach separate spreadsheet

Client name	Wrapper ID	DFM model name	% DFM fee inclusive of value added tax (VAT) at the current rate

## 3. Adviser details

I declare that the above instruction is given in accordance with a current discretionary management agreement for the investors listed in section 2 of this form.

Date

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Adviser firm name

Financial services register number

Print name of adviser

Adviser stamp

Signature of adviser (signature not required if sending instruction by email).

X	X
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