

For customers

Shareholder Rights Directive II – Scottish Equitable plc shareholder engagement statement

To promote the long-term success of companies, Scottish Equitable plc acknowledges the importance of investor stewardship and engagement. Scottish Equitable plc is a pensions and investment provider which operates under the Aegon brand. It manages the Aegon pension funds offered via Aegon Retirement Choices, One Retirement, Retiready and our Scottish Equitable Pensions. Investments that aren't managed by Aegon, TargetPlan funds and our Retiready ISA investments are managed separately.

It's in the best interest of our customers that we monitor the companies in which we invest, that we vote on the shares that we hold and that we engage with companies on issues like strategy, risk and corporate governance. We believe that actively engaging with companies to improve sustainability performance and corporate behaviour, is more effective than excluding companies from our investment list. Under the Aegon brand, Scottish Equitable plc has developed its [Responsible Investing Framework](#) and is developing its Shareholder Engagement Policy which will be published on our website in due course.

Scottish Equitable plc is subject to a regulation called the Shareholder Rights Directive II, and as part of that we disclose information about the voting records of our asset managers. For the purposes of this Directive, Aegon Asset Management is our asset manager because they manage and vote on the segregated mandates of Scottish Equitable Plc. Find out about their approach to [responsible investing](#) and view their [voting records](#).

We also offer a number of funds from other fund managers. We aren't required to disclose voting records for those fund managers as part of this directive, but voting records can usually be found on their websites.