



For customers

Signing in and using the Aegon Customer Dashboard

The screens shown are for demonstration
purposes only. They don't represent a real
customer

How to sign in

This guide shows how you can activate your Aegon Customer Dashboard account.

You can also see how to sign in once you've activated, navigate around your account, and request a password reset.



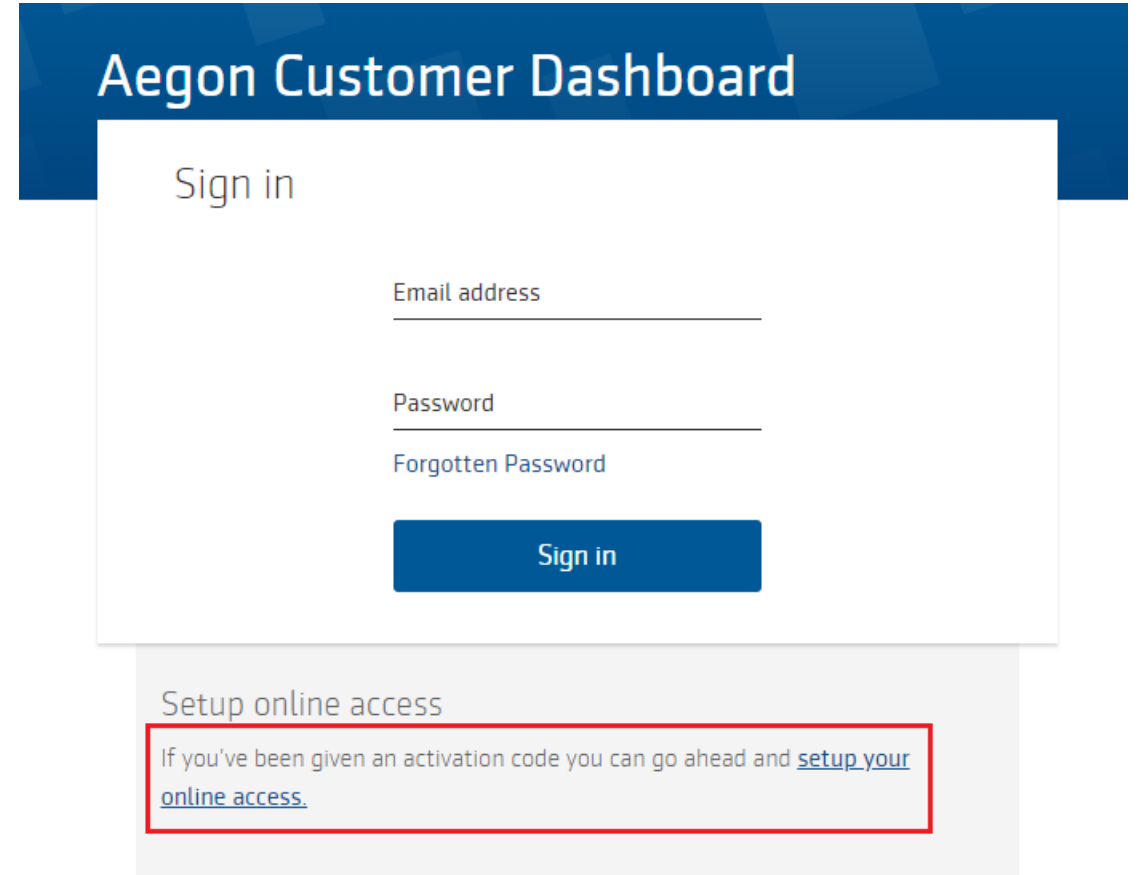


Activating your account



Activating your account

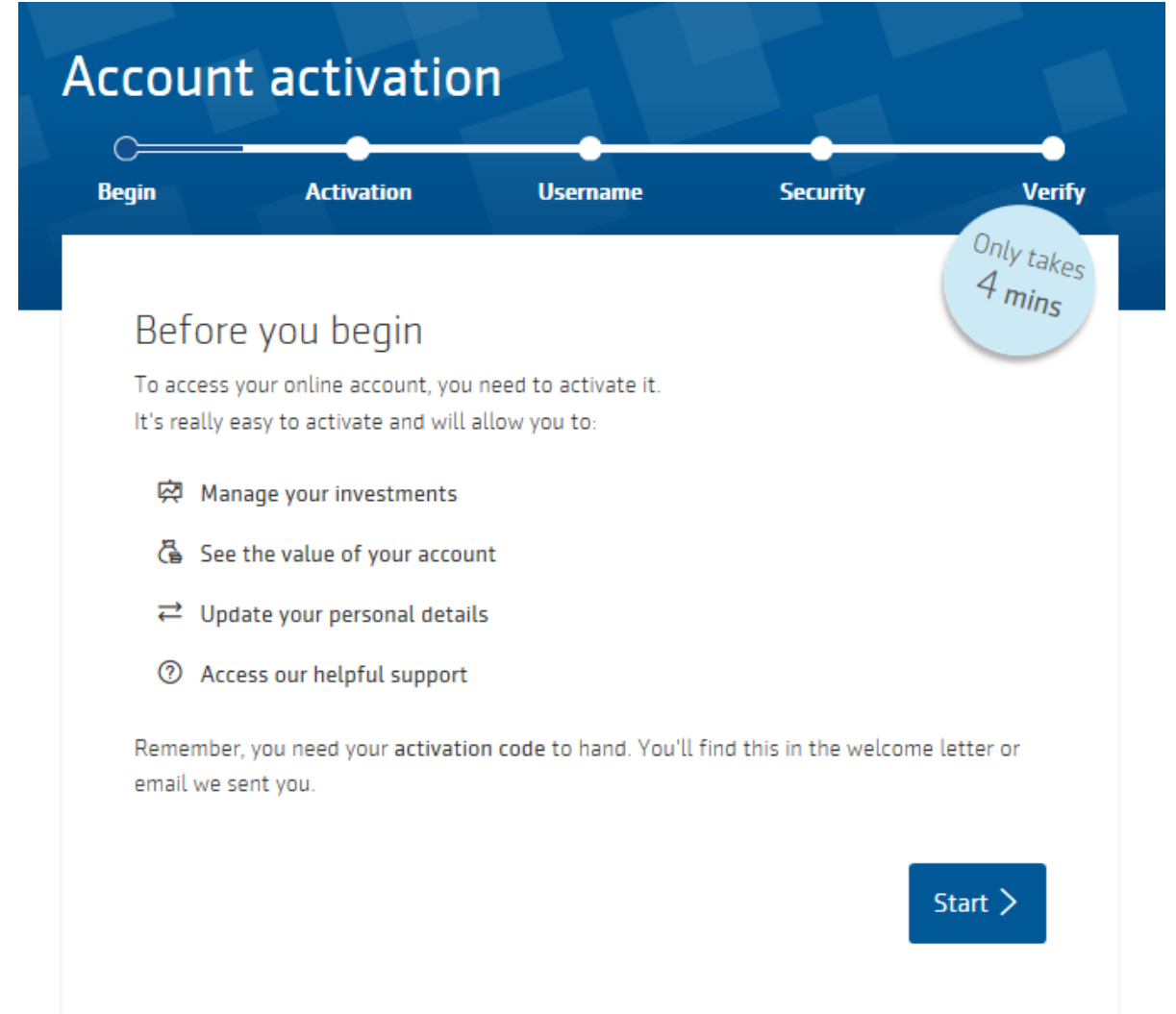
- If you have your activation email, open this and select **Activate my account**. You can then proceed to the next page of this guide.
- If you don't have your activation email, go to ap3.aegon.co.uk/login and select **setup your online access**.



The screenshot displays the Aegon Customer Dashboard interface. At the top, a dark blue header contains the text "Aegon Customer Dashboard" in white. Below this, a white box titled "Sign in" contains three input fields: "Email address", "Password", and "Forgotten Password". A blue "Sign in" button is positioned below these fields. Below the white box, a grey box titled "Setup online access" contains a red-bordered box with the text: "If you've been given an activation code you can go ahead and [setup your online access](#)."

Activating your account - Begin

- You'll need the 10-digit activation code we sent you in the welcome email or letter. If you don't have this, contact us.
- If you have your 10-digit activation code, read over the information and then select **Start**.



The screenshot shows the 'Account activation' process at the 'Begin' stage. A progress bar at the top indicates five steps: Begin, Activation, Username, Security, and Verify. The 'Begin' step is currently active. A circular badge on the right side of the progress bar states 'Only takes 4 mins'. The main content area is titled 'Before you begin' and explains that activation is required to access the online account. It lists four benefits of activation: managing investments, viewing account value, updating personal details, and accessing support. A reminder at the bottom states that the activation code is found in the welcome letter or email. A blue 'Start >' button is located in the bottom right corner.

Account activation

Begin Activation Username Security Verify

Only takes 4 mins

Before you begin

To access your online account, you need to activate it. It's really easy to activate and will allow you to:

- Manage your investments
- See the value of your account
- Update your personal details
- Access our helpful support

Remember, you need your activation code to hand. You'll find this in the welcome letter or email we sent you.

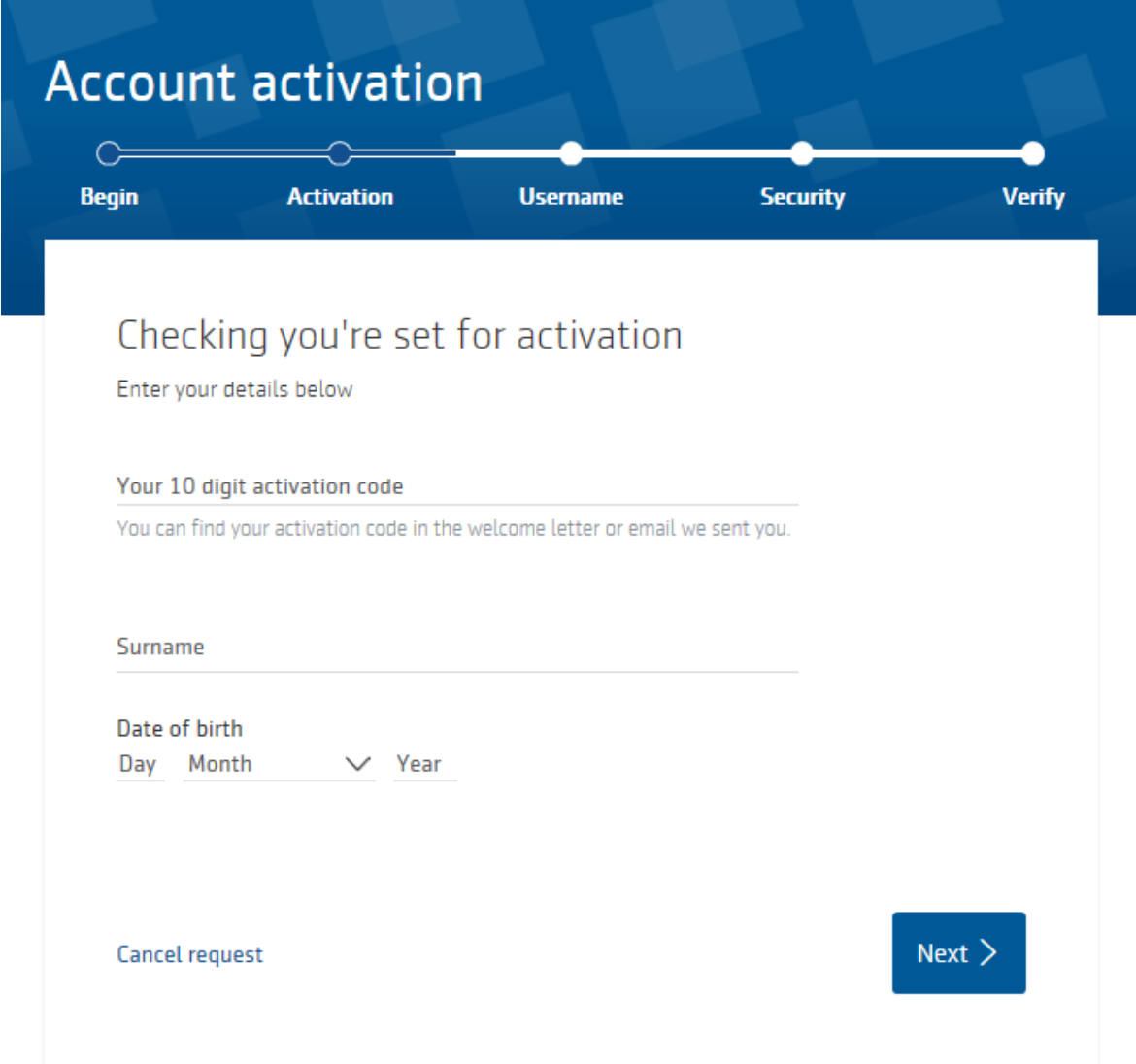
Start >

Activating your account - activation

Enter:

- **Your 10-digit activation code**
- **Surname**
- **Date of birth**

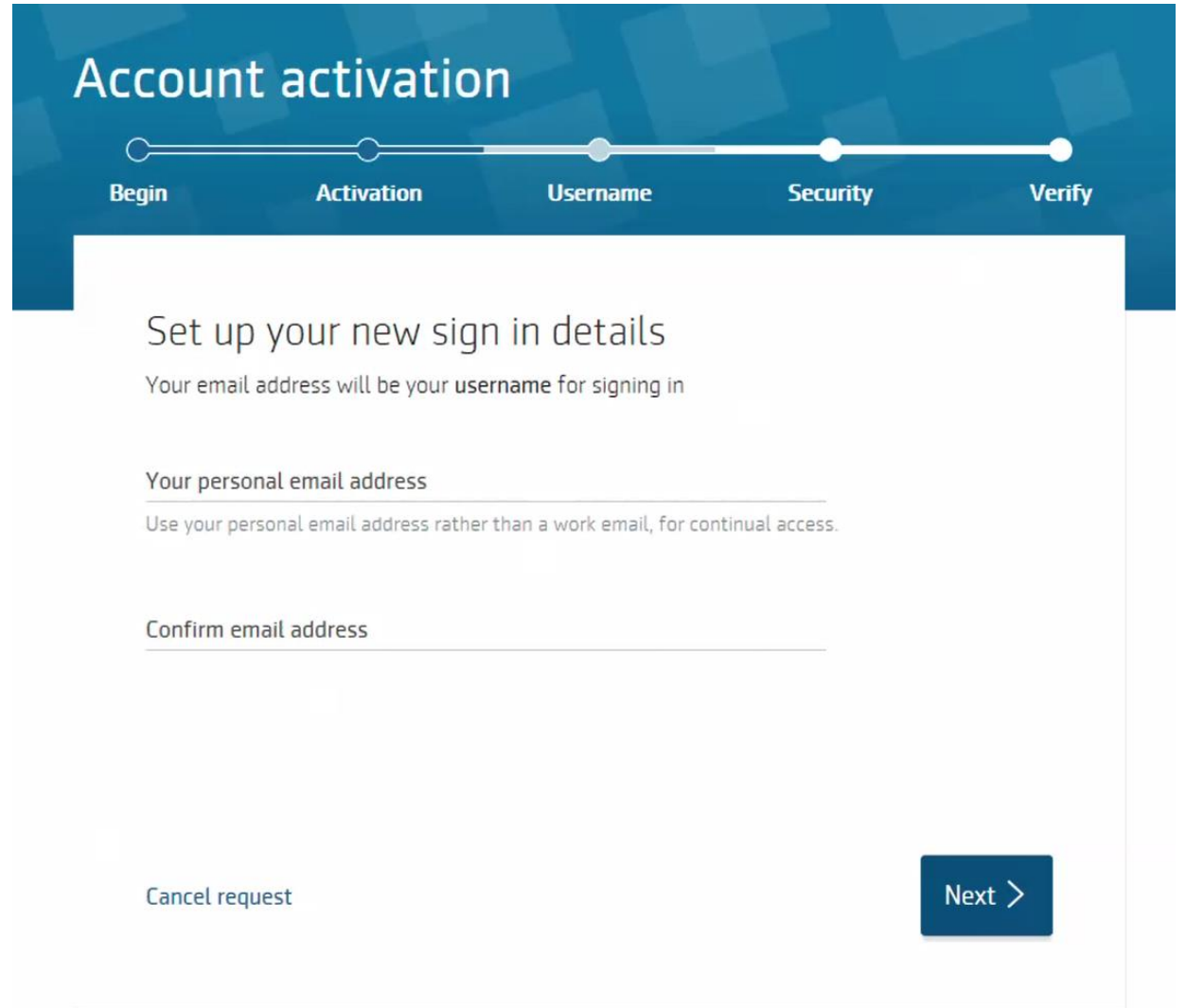
Select **Next** to continue.



The screenshot displays the 'Account activation' interface. At the top, a progress bar shows five steps: 'Begin', 'Activation', 'Username', 'Security', and 'Verify'. The 'Activation' step is currently active. Below the progress bar, the heading 'Checking you're set for activation' is followed by the instruction 'Enter your details below'. There are three input fields: 'Your 10 digit activation code' with a hint 'You can find your activation code in the welcome letter or email we sent you.', 'Surname', and 'Date of birth' which is a dropdown menu with 'Day', 'Month', and 'Year' options. At the bottom left is a 'Cancel request' link, and at the bottom right is a blue 'Next >' button.

Activating your account – user name

- Enter **Your personal email address** and **Confirm your email address** by entering it a second time. This is just to make sure it's correct.
- Select **Next** to continue.



The screenshot shows a web interface for 'Account activation'. At the top, a blue header contains the title 'Account activation' and a progress bar with five steps: 'Begin', 'Activation', 'Username', 'Security', and 'Verify'. The 'Username' step is currently active. Below the header, the main content area has a light blue background. It starts with the heading 'Set up your new sign in details' and a subtext 'Your email address will be your username for signing in'. There are two input fields: 'Your personal email address' and 'Confirm email address'. A note below the first field says 'Use your personal email address rather than a work email, for continual access.' At the bottom left is a link 'Cancel request', and at the bottom right is a blue button labeled 'Next >'.

Account activation

Begin Activation Username Security Verify

Set up your new sign in details

Your email address will be your username for signing in

Your personal email address

Use your personal email address rather than a work email, for continual access.

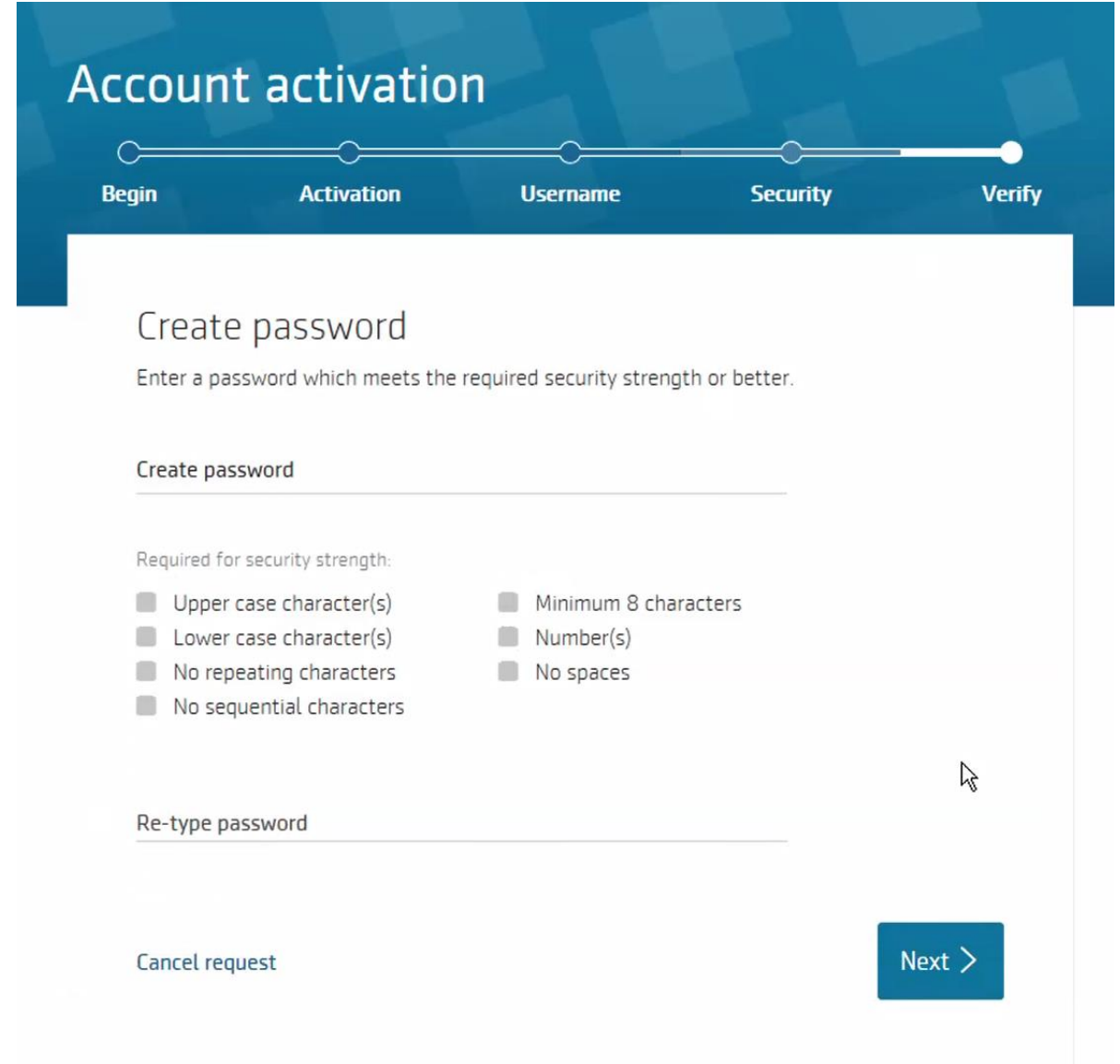
Confirm email address

Cancel request

Next >

Activating your account – security

- Now you need to set up a password for your account.
- Your password must meet our security strength criteria.
- As you type your password each criteria will be coloured green to confirm you've met it. If it's not been met, it will show as red.
- We then ask you to **Re-type password**.
- Select **Next** to continue.



The screenshot shows a web interface for 'Account activation'. At the top, a progress bar has five steps: 'Begin', 'Activation', 'Username', 'Security', and 'Verify'. The 'Security' step is currently active, indicated by a white circle and a line. Below the progress bar, the main heading is 'Create password'. Underneath, it says 'Enter a password which meets the required security strength or better.' There is a text input field labeled 'Create password'. Below the input field, a section titled 'Required for security strength:' lists eight criteria, each with a checkbox: 'Upper case character(s)', 'Lower case character(s)', 'No repeating characters', 'No sequential characters', 'Minimum 8 characters', 'Number(s)', and 'No spaces'. Below this list is another text input field labeled 'Re-type password'. At the bottom left, there is a link 'Cancel request'. At the bottom right, there is a blue button labeled 'Next >'. A mouse cursor is visible over the 'Next >' button.

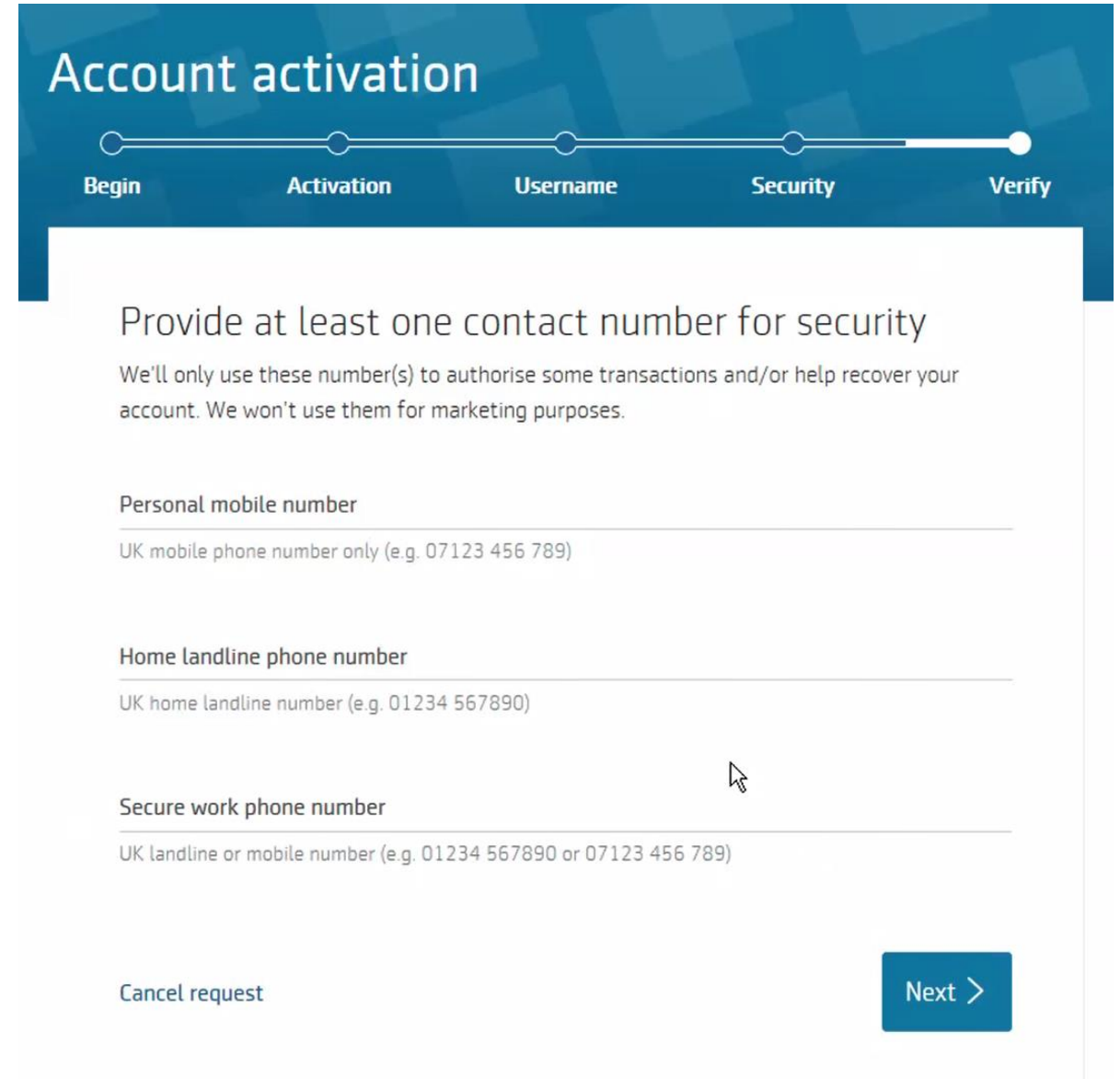
Activating your account – verify

We now need to you to give us a contact number we so have this for security checks in the future.

Complete at least **one** of the following:

- **Personal mobile number**
- **Home landline phone number**
- **Secure work phone number**

Select **Next** to continue.



The screenshot shows a web interface for 'Account activation'. At the top, a blue header contains the title 'Account activation' and a progress bar with five steps: 'Begin', 'Activation', 'Username', 'Security', and 'Verify'. The 'Verify' step is currently active, indicated by a white circle and a line extending to it. Below the header, the main content area has a white background. It starts with the instruction 'Provide at least one contact number for security' followed by a subtext: 'We'll only use these number(s) to authorise some transactions and/or help recover your account. We won't use them for marketing purposes.' There are three input fields, each with a label and a placeholder: 'Personal mobile number' (placeholder: 'UK mobile phone number only (e.g. 07123 456 789)'), 'Home landline phone number' (placeholder: 'UK home landline number (e.g. 01234 567890)'), and 'Secure work phone number' (placeholder: 'UK landline or mobile number (e.g. 01234 567890 or 07123 456 789)'). A mouse cursor is hovering over the 'Secure work phone number' field. At the bottom left, there is a link 'Cancel request'. At the bottom right, there is a blue button labeled 'Next >'.

Activating your account – verify

Finally we need you to **Create a 6-digit security PIN.**

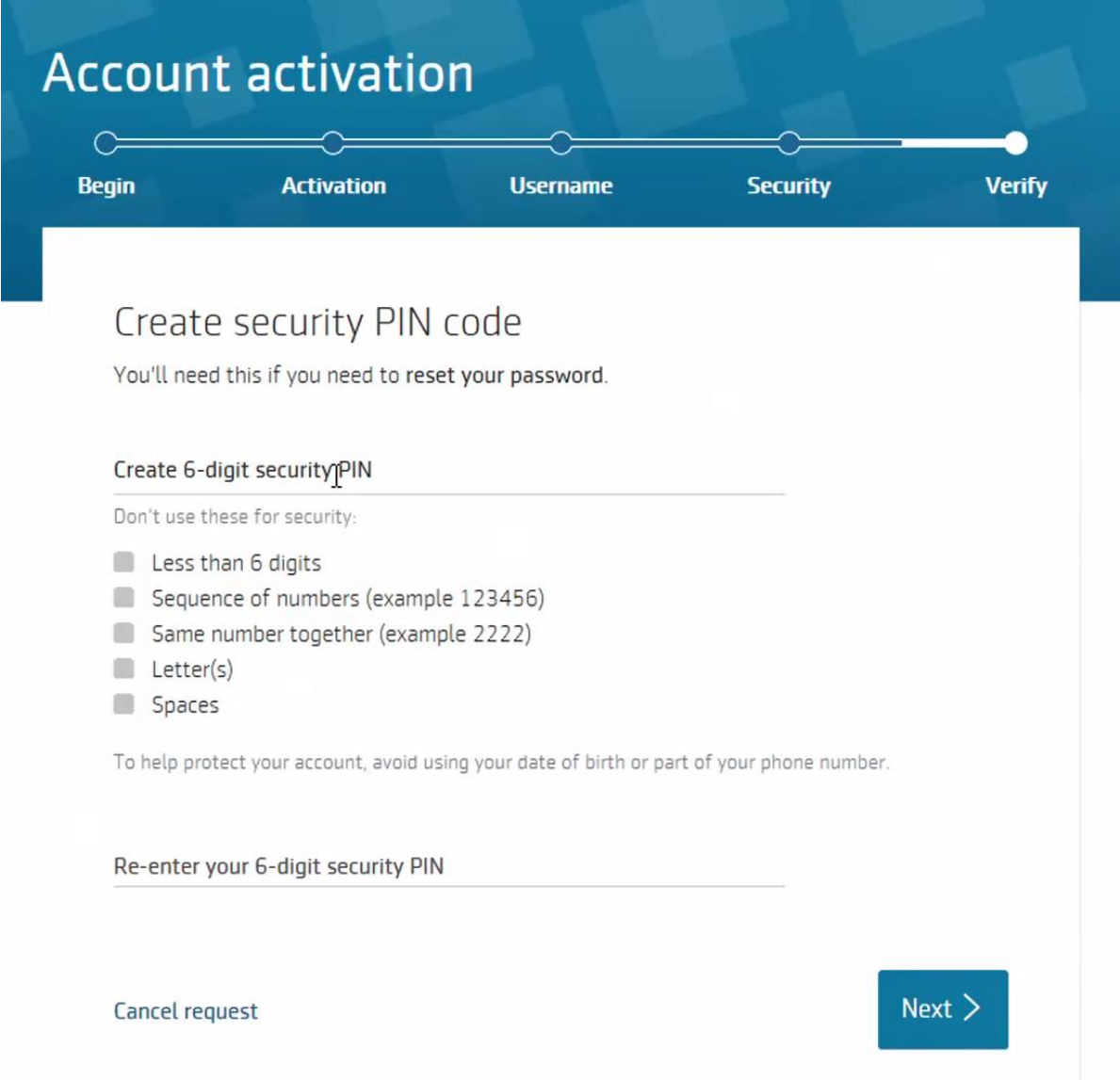
You'll need this in the future if you have to reset your password.

Your PIN must meet our security strength criteria.

As you type your PIN each criteria will be coloured green to confirm you've met it. If it's not been met, it will show as red.

We then ask you to **Re-enter your 6-digit security PIN.**

Select **Next** to continue.

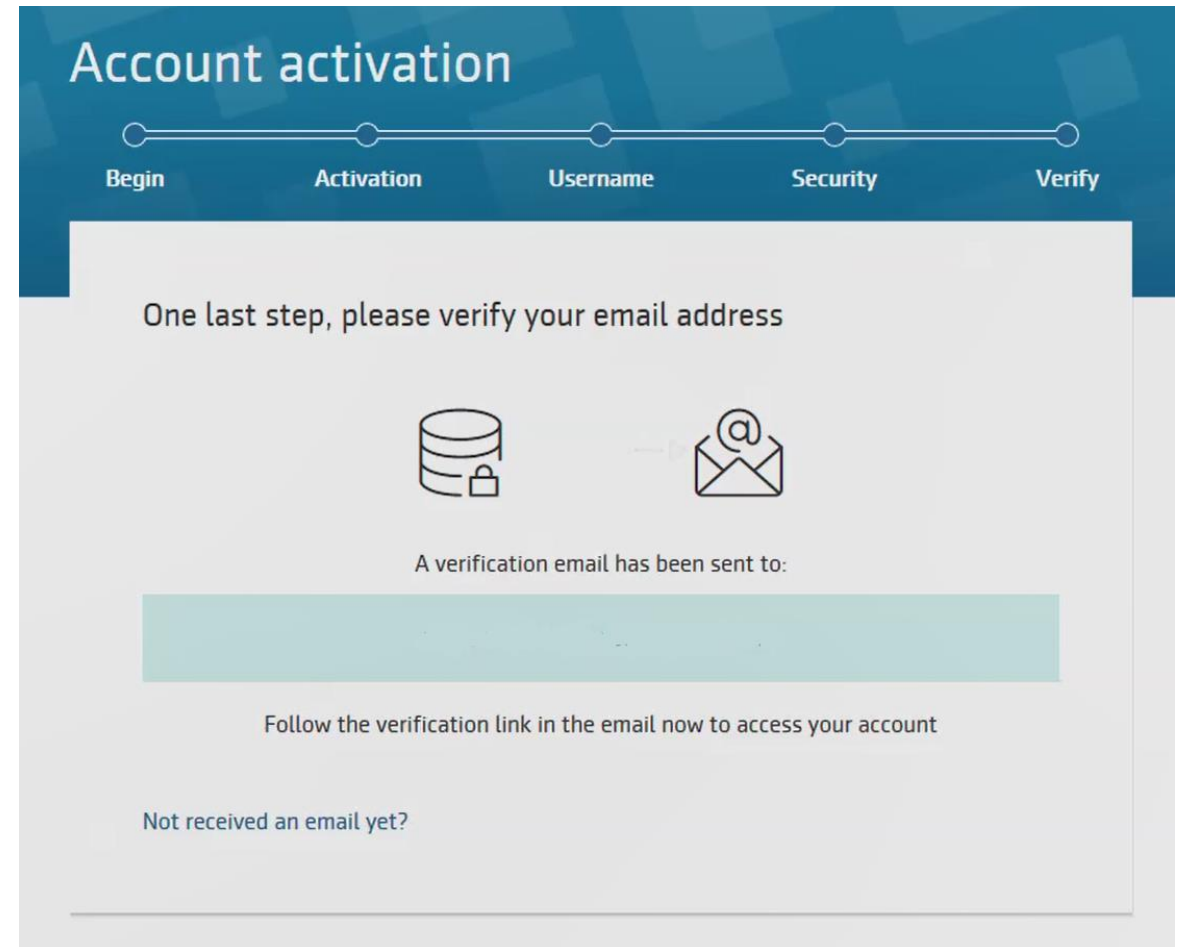


The screenshot shows the 'Account activation' process at the 'Verify' stage. A progress bar at the top indicates the steps: Begin, Activation, Username, Security, and Verify (which is the current step). The main heading is 'Create security PIN code' with a subtext: 'You'll need this if you need to reset your password.' Below this is a text input field labeled 'Create 6-digit security PIN'. Underneath the input field, a list of criteria to avoid is shown with checkboxes: 'Less than 6 digits', 'Sequence of numbers (example 123456)', 'Same number together (example 2222)', 'Letter(s)', and 'Spaces'. A note states: 'To help protect your account, avoid using your date of birth or part of your phone number.' Below this is another text input field labeled 'Re-enter your 6-digit security PIN'. At the bottom left is a 'Cancel request' link, and at the bottom right is a blue 'Next >' button.

Activating your account – verify

If we haven't verified your email address previously, you will then receive a **verification email**.

You can select the link in the email to sign in to the **Customer Dashboard**.





Signing in to the Aegon Customer Dashboard



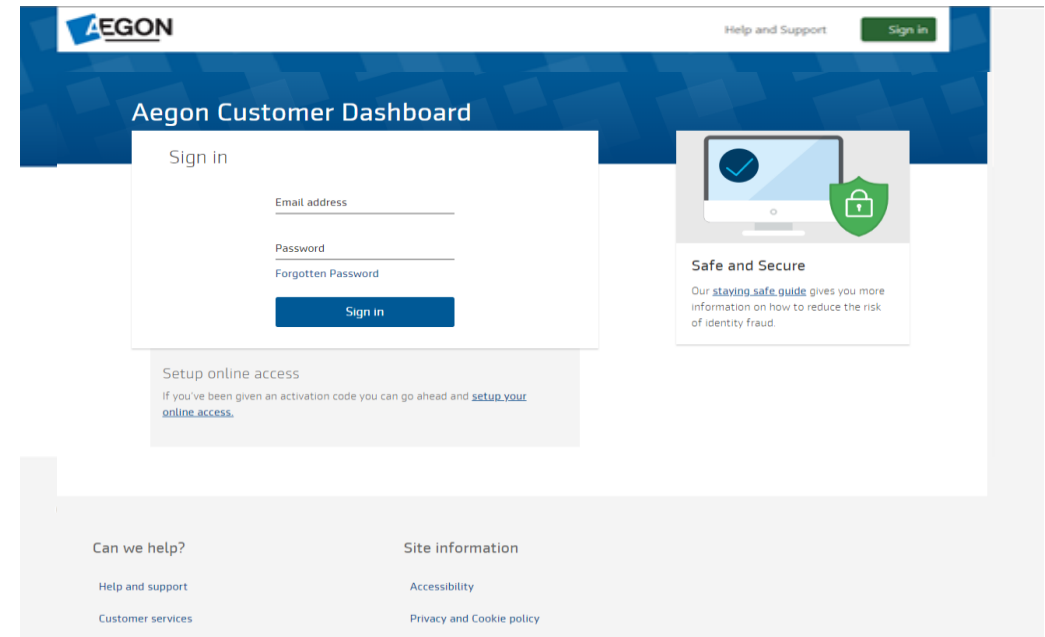
Signing in to the Aegon Customer Dashboard

Go to ap3.aegon.co.uk/login

Enter your **Email address** and **Password**

If you've forgotten your sign in details,
please select **Forgotten password**

- Then select **Sign in**



The screenshot shows the Aegon Customer Dashboard login interface. At the top, there is a blue header with the Aegon logo on the left, 'Help and Support' with a 'Sign in' button on the right, and the title 'Aegon Customer Dashboard' in the center. Below the header, the main content area is divided into three sections. The first section, titled 'Sign in', contains three input fields: 'Email address', 'Password', and 'Forgotten Password', followed by a blue 'Sign in' button. The second section, titled 'Setup online access', contains a link to 'setup your online access'. The third section, titled 'Safe and Secure', features an illustration of a computer monitor with a checkmark and a shield icon, and text stating 'Our [staying safe guide](#) gives you more information on how to reduce the risk of identity fraud.' At the bottom of the page, there is a footer with two columns of links. The left column, titled 'Can we help?', includes 'Help and support' and 'Customer services'. The right column, titled 'Site information', includes 'Accessibility' and 'Privacy and Cookie policy'.



Navigating your account



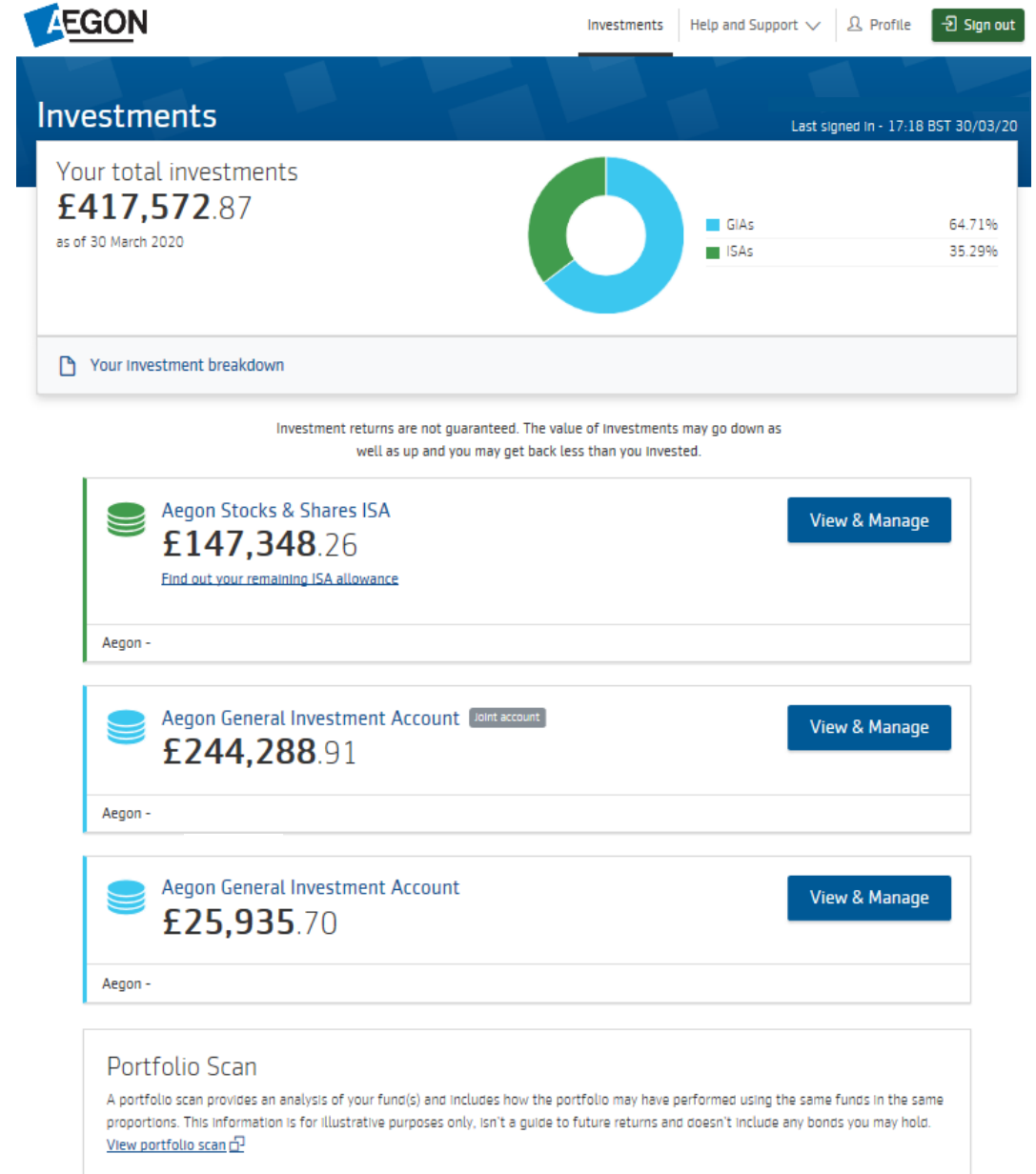
Navigating your account

Once you've signed in, you'll see all your products listed.

You can see the value of **Your total investments**.

You can also see the value of each product you have along with an option to **View & Manage** at a product level.

You can also see **Portfolio Scan** that you can use to give you various reports of your investments.



View & Manage

Selecting **View & Manage** against one of your products lets you see more information on that product.

The most popular requests people want to carry out are at the top.

- **Top up** – add more money to your product
- **Switch funds** – change the funds you're invested in
- **Manage regulars** – set up, amend or delete regular payments or withdrawals

Other requests are under **More options**.

You can also see an **Overview, Transactions, Charges** and **Documents** for your product.

The screenshot shows the Aegon Stocks & Shares ISA management page. At the top, the Aegon logo is on the left, and navigation links for 'Investments', 'Help and Support', 'Profile', and 'Sign out' are on the right. The main heading is 'Aegon Stocks & Shares ISA'. Below this, the current value is displayed as '£36,924.38' as of 24 January 2020, including £0.00 available cash. Three primary action buttons are shown: 'Top up', 'Switch funds', and 'Manage regulars', along with a 'More options' dropdown. A disclaimer states: 'Investment returns are not guaranteed. The value of investments may go down as well as up and you may get back less than you invested.' Below this are tabs for 'Overview', 'Transactions', 'Charges', and 'Documents'. The 'Overview' tab is active, showing the 'Tax year allowance limit' and 'Your investments'. The 'Your investments' section features a donut chart showing 100.00% in 'L&G Mixed Investment 20-60% C Acc'. At the bottom, a table provides a detailed breakdown of the investment.

Investment	Units	Price	Value	%
L&G Mixed Investment 20-60% C Acc	55,743.333	£0.6624	£36,924.38	100.00%



Resetting your password



Resetting your password

If you forget your password you can reset your password.

Select **Forgotten Password**

If your account is locked please [contact us](#).

setup your online access.'"/>

Aegon Customer Dashboard

Sign in

Email address

Password

Forgotten Password

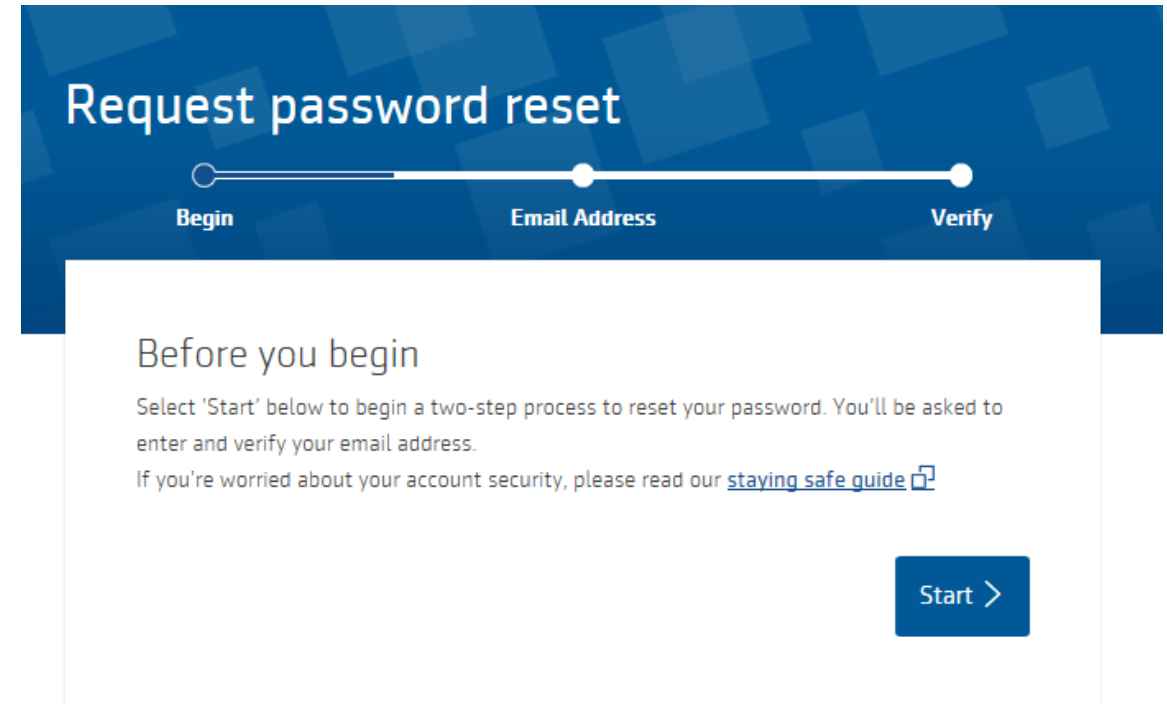
Sign in

Setup online access

If you've been given an activation code you can go ahead and [setup your online access](#).

Resetting your password

Read over the information shown and then select **Start**.




Request password reset

Begin Email Address Verify

Before you begin

Select 'Start' below to begin a two-step process to reset your password. You'll be asked to enter and verify your email address.

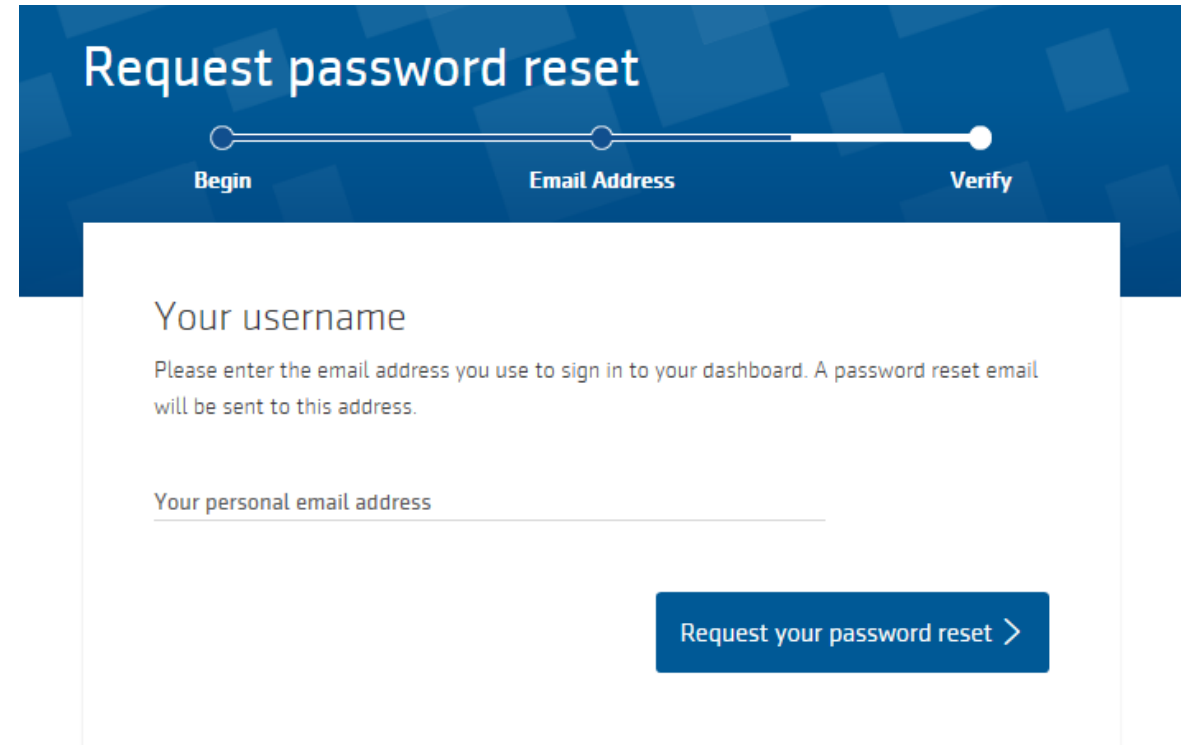
If you're worried about your account security, please read our [staying safe guide](#) 

Start >

Resetting your password – email address

Enter **Your personal email address** you use to sign in to your Aegon Customer Dashboard account.

Select **Request your password reset**.



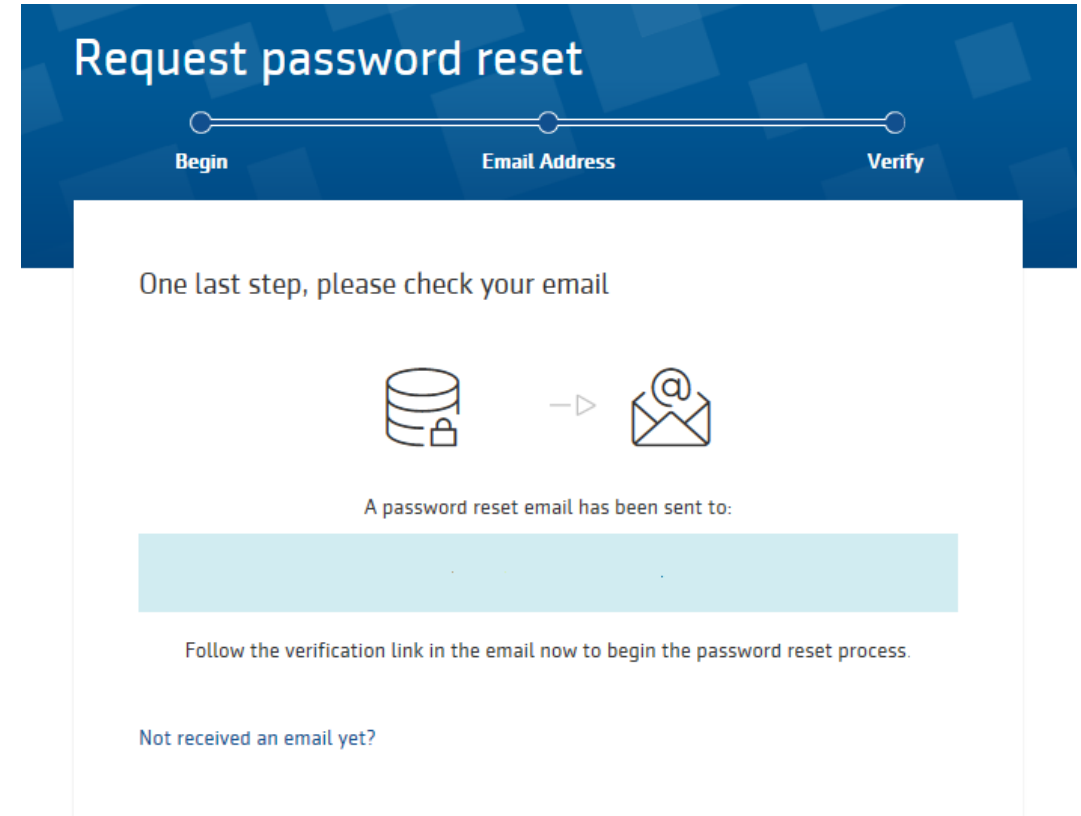
The screenshot shows a web interface for requesting a password reset. At the top, a blue header contains the title 'Request password reset' and a progress bar with three steps: 'Begin', 'Email Address', and 'Verify'. The 'Email Address' step is currently active. Below the header, the main content area has a light blue background. It starts with the heading 'Your username' followed by a paragraph: 'Please enter the email address you use to sign in to your dashboard. A password reset email will be sent to this address.' Below this is a text input field labeled 'Your personal email address'. At the bottom right of the form is a blue button with the text 'Request your password reset >'.

Resetting your password – Verify

We'll now send you an email.

Check your inbox - if it's not there, give it a few minutes. If still not there, check your junk mail folder.

Now follow the instructions in the email.





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