

# Add, remove, or change a financial adviser or third party

If your personal circumstances mean you need any additional support, or if you'd like a large print, braille, or audio CD version of this document, please call 0345 604 4001 (call charges will vary) or visit [aegon.co.uk/support](https://aegon.co.uk/support).

## What is this form for?

You can use this form to add or remove a financial adviser to service your product(s). You can also use this form to grant or remove authority to a financial adviser or third party to access information about your product(s).

## How to complete the form

Please complete this form by typing in the boxes below, including the signature boxes and email it to [aegoncofundsadministration@aegon.co.uk](mailto:aegoncofundsadministration@aegon.co.uk)

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

If you disclose information about a third party as part of this application, please ensure that you have their permission and have informed them of the purposes of the collection of this information before doing so.

I wish to:

- Grant authority for an adviser to access information about my product(s) - complete sections 1, 2 and 4.
- Appoint an adviser to service my product(s) - complete sections 1, 2 and 4.
- Remove an adviser - complete sections 1, 2 and 4.
- Grant authority for a third party to access information about my product(s) - complete sections 1, 3 and 4.
- Change or remove a third party - complete sections 1, 3 and 4.

## Financial advisers only:

- Grant authority for an adviser to access information on my clients' product(s), using my firm's own form or letterhead - complete section 1.
- Appoint a new adviser to service my clients' product(s), using my firm's own form or letterhead - complete section 1.

## 1.1 Customer details

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

Full forename(s)


Surname


Permanent residential address


Postcode

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Date of birth

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Customer number

3									
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Email

We'll only use your email address to contact you about your plan. We might also use it to keep you informed about our products and services but only where you've consented to this.

If this instruction is to only be applied to a specific product, please provide wrapper number(s) below.

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## 1.2 General Investment Account (GIA) – joint holders only

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Second account holder

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

Full forename(s)


Surname


Date of birth

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Permanent residential address


Postcode

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Email

We'll only use your email address to contact you about your plan. We might also use it to keep you informed about our products and services but only where you've consented to this.







