

# Aegon Junior ISA top up form

In this form, 'I', 'me', 'you', 'your' or 'my' refers to the registered contact named in section 2, and 'Aegon', 'we', or 'our' refers to Cofunds Limited.

Use this form to top up an existing Aegon Junior ISA ('Aegon JISA') on behalf of a child who is under 18 and living in the UK, or if you are the child and aged between 16 and 18 and have applied to become the registered contact and your application has been accepted. The overall JISA allowance is £9,000 for the 2020/2021 tax year.

You must have been provided with an illustration, together with the Aegon JISA Key Features Document, a Key Investor Information Document and/or Key Information Document for each fund you are investing in before completing and returning this form. If you haven't we will not be able to process your request. Please contact us on 0345 604 4001 (call charges will vary) to request an illustration and/or any of the key documents.

Please complete this form in BLOCK CAPITALS and ballpoint pen and return it and any additional information to: Aegon Cofunds Administration, PO Box 17491, Edinburgh, EH12 1PB.

Whenever you see this icon , you may have to send us additional information.

Illustration number

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## 1. Child details

### 1.1 Product number

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

Full forename(s)

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
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### 1.2 Please tell us:

National Insurance number (if the child is over 16 and holds one)

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You should be able to find your NI number on a payslip, form P45 or P60, a letter from HM Revenue & Customs, or a letter from the DWP.

The child **doesn't** have a National Insurance number

Permanent residential address

Postcode



### 3. Top-up details

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3.1 The investment into the Aegon JISA will be funded by:

Cheque

Bank transfer

For a Bank transfer you can find our bank details along with your illustration.

Important note: Please ensure for both bank transfers and cheques you give the Aegon JISA product number, or the surname and date of birth as the reference when you make the payment so we can tie it up with their account.

Cheques must be made payable to Aegon (we'll also accept Cofunds Ltd). For Building Society cheque or banker's draft your name must appear on the front of the cheque, or on the back of the cheque accompanied by the Building Society's or Bank's official stamp and signature.

### 3.2 Third Party Details

Complete this section if you're not the child or registered contact but are funding the Aegon JISA.  
Aegon customer number (if applicable)

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

Full forename(s)

Surname

Permanent residential address

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text" value="Postcode"/>

Date of birth

We might need to know where the money you are investing has come from. If we do, we'll contact you to ask where the money has come from and for documentary evidence of this.

The amount you subscribe is a gift to the child and we can't repay it to the subscriber if at a later date they change their mind.

### 4. Source of wealth

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Your source of wealth is how you got the money to invest, for example from regular savings from your salary, selling a property or an inheritance payment. Your source of funds is the details of the bank account that your money to invest comes from.

Source of funds

Source of wealth

## 5. Investment details

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In this section, you need to tell us how you'd like to invest the top up into the Aegon JISA.

Use the existing investment strategy.

Invest as set out in the table below.

The investments should match the illustration you received from us, if they don't we won't be able to process your request. If you wish to choose different investments, please contact us for a new illustration.

Full investment manager name, fund name and share class	SEDOL code (this is shown in your Key Investor Information Document (KIIDs))	% to be invested
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
Aegon ISA cash facility	n/a	%
<b>Total amount</b>	n/a	<b>100%</b>

If you need to add additional funds, please provide the information on a separate sheet of paper in the format above, sign and date it and attach it to this form ☒.

The investment choices you make can be applied to all future investment choices in this product.

Use the investment choices above as my new default investment strategy for all future single payments into this product.

## 6. Investment income options

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If you have income-generating investments, this section lets you choose how any income distributions paid from those investments should be dealt with when we receive them from the investment provider or change any existing instruction you have given us. We'll apply your selection to all income generating investments you hold within the Aegon JISA.

Please tick one of the following options:

**Reinvest in fund (default)** – reinvest any income received back into the same fund investment.

**Leave in cash** – pay any income into the Aegon JISA cash facility.

