



Aegon SIPP application requirements

This communication mustn't be distributed to, or relied on by customers. The table below details which forms you'll need for the Aegon Sipp for new client product transactions. All forms are available on the Aegon Platform document library at <https://intermediary.aegon.co.uk/content/help-and-support.html?tab=document-library>. Signatures are not required when submitting digital forms that can have the client's name typed into the signature box.

Application type	Digital form/online process	Digital form link
Single contribution	<ul style="list-style-type: none"> Online quote and apply process 	
	<ul style="list-style-type: none"> Death benefit nomination/ expression of wish form 	https://intermediary.aegon.co.uk/content/dam/common/documents/death-benefit-nomination-form-aegon-platform.pdf
Regular Contributions	<ul style="list-style-type: none"> Online quote and apply process 	
	<ul style="list-style-type: none"> Records of payment due (New employer regulars only) 	https://intermediary.aegon.co.uk/content/dam/common/documents/record-of-payments-due.pdf
	<ul style="list-style-type: none"> Death benefit nomination/ expression of wish form 	https://intermediary.aegon.co.uk/content/dam/common/documents/death-benefit-nomination-form-aegon-platform.pdf

Application type	Digital form/online process	Digital form link
Accumulation Transfer	<ul style="list-style-type: none"> Online quote and apply process 	
	<ul style="list-style-type: none"> Transfer authority form 	https://intermediary.aegon.co.uk/content/dam/common/documents/transfer-authority-aegon-sipp.pdf
	<ul style="list-style-type: none"> Re-registration transfer authority form (only if re-registration applies) 	https://intermediary.aegon.co.uk/content/dam/common/documents/aegon-sipp-re-registration-authority.pdf
	<ul style="list-style-type: none"> Death benefit nomination/ expression of wish form 	https://intermediary.aegon.co.uk/content/dam/common/documents/death-benefit-nomination-form-aegon-platform.pdf
	<ul style="list-style-type: none"> Discharge form 	You only need to complete a form if the ceding scheme requests one.
Transfer for full immediate crystallisation	<ul style="list-style-type: none"> Aegon SIPP immediate drawdown application form 	https://intermediary.aegon.co.uk/content/dam/common/documents/application-form-aegon-sipp-immediate-drawdown.pdf
	<ul style="list-style-type: none"> Transfer authority form 	https://intermediary.aegon.co.uk/content/dam/common/documents/transfer-authority-aegon-sipp.pdf
	<ul style="list-style-type: none"> Re-registration transfer authority form (only if re-registration applies) 	https://intermediary.aegon.co.uk/content/dam/common/documents/aegon-sipp-re-registration-authority.pdf
	<ul style="list-style-type: none"> Death benefit nomination/ expression of wish form 	https://intermediary.aegon.co.uk/content/dam/common/documents/death-benefit-nomination-form-aegon-platform.pdf
	<ul style="list-style-type: none"> Discharge form 	You only need to complete a form if the ceding scheme requests one.

Application type	Digital form/online process	Digital form link
Transfer for partial immediate crystallisation	<ul style="list-style-type: none"> Aegon SIPP immediate drawdown form 	https://intermediary.aegon.co.uk/content/dam/common/documents/application-form-aegon-sipp-immediate-drawdown.pdf
	<ul style="list-style-type: none"> Aegon SIPP benefit crystallisation event application form (flexi-access drawdown) 	Please contact us to request this form.
	<ul style="list-style-type: none"> Transfer authority form 	https://intermediary.aegon.co.uk/content/dam/common/documents/transfer-authority-aegon-sipp.pdf
	<ul style="list-style-type: none"> Re-registration transfer authority form (only if re-registration applies) 	https://intermediary.aegon.co.uk/content/dam/common/documents/aegon-sipp-re-registration-authority.pdf
	<ul style="list-style-type: none"> Death benefit nomination / expression of wish form 	https://intermediary.aegon.co.uk/content/dam/common/documents/death-benefit-nomination-form-aegon-platform.pdf
	<ul style="list-style-type: none"> Discharge form 	You only need to complete a form if the ceding scheme requests one.

Application type	Digital form/online process	Digital form link
Transfer of existing partial drawdown	<ul style="list-style-type: none"> Aegon SIPP application pack 	https://intermediary.aegon.co.uk/content/dam/common/documents/aegon-self-invested-personal-pension-pack.pdf
	<ul style="list-style-type: none"> Aegon SIPP drawdown to drawdown transfer form 	https://intermediary.aegon.co.uk/content/dam/common/documents/transfer-application-form-aegon-sipp-drawdown-to-drawdown.pdf
	<ul style="list-style-type: none"> Transfer authority form (2 needed, one for uncrystallised assets and one for crystallised assets) 	https://intermediary.aegon.co.uk/content/dam/common/documents/transfer-authority-aegon-sipp.pdf
	<ul style="list-style-type: none"> Re-registration transfer authority form (only if re-registration applies) 	https://intermediary.aegon.co.uk/content/dam/common/documents/aegon-sipp-re-registration-authority.pdf
	<ul style="list-style-type: none"> Aegon SIPP benefit crystallisation event form (flexi-access drawdown) (only if the client requires income) 	Please contact us to request this form.
	<ul style="list-style-type: none"> Death benefit nomination / expression of wish form 	https://intermediary.aegon.co.uk/content/dam/common/documents/death-benefit-nomination-form-aegon-platform.pdf
	<ul style="list-style-type: none"> Discharge form 	You only need to complete a form if the ceding scheme requests one.

Application type	Digital form/online process	Digital form link
Transfer of existing full drawdown	<ul style="list-style-type: none"> Aegon SIPP drawdown to drawdown transfer form 	https://intermediary.aegon.co.uk/content/dam/common/documents/transfer-application-form-aegon-sipp-drawdown-to-drawdown.pdf
	<ul style="list-style-type: none"> Aegon SIPP benefit crystallisation event application form (flexi-access drawdown) (only if the client requires income) 	Please contact us to request this form.
	<ul style="list-style-type: none"> Transfer authority form 	https://intermediary.aegon.co.uk/content/dam/common/documents/transfer-authority-aegon-sipp.pdf
	<ul style="list-style-type: none"> Re-registration transfer authority form (only if re-registration applies) 	https://intermediary.aegon.co.uk/content/dam/common/documents/aegon-sipp-re-registration-authority.pdf
	<ul style="list-style-type: none"> Death benefit nomination / expression of wish form 	https://intermediary.aegon.co.uk/content/dam/common/documents/death-benefit-nomination-form-aegon-platform.pdf
	<ul style="list-style-type: none"> Discharge form 	You only need to complete a form if the ceding scheme requests one.

The table below details which forms you'll need for existing client product transactions for the Aegon Sipp. All forms are available on the Aegon Platform Document Library at <https://intermediary.aegon.co.uk/content/help-and-support.html?tab=document-library>

Application type	Digital form/online process	Digital form link
Top Up	<ul style="list-style-type: none"> Online top up process 	
Accumulation Transfer	<ul style="list-style-type: none"> Online top up process 	
	<ul style="list-style-type: none"> Transfer authority 	https://intermediary.aegon.co.uk/content/dam/common/documents/transfer-authority-aegon-sipp.pdf
	<ul style="list-style-type: none"> Re-registration transfer authority form (only if re-registration applies) 	https://intermediary.aegon.co.uk/content/dam/common/documents/aegon-sipp-re-registration-authority.pdf
	<ul style="list-style-type: none"> Discharge form 	You only need to complete a form if the ceding scheme requests one.
Take Pension Commencement Lump Sum/income	<ul style="list-style-type: none"> Benefit crystallisation event application form 	Please contact us to request this form.
	<ul style="list-style-type: none"> Ad hoc income request form (where funds are already in drawdown) 	Please contact us to request this form.

Application type	Digital form/online process	Digital form link
Amend income	<ul style="list-style-type: none"> Aegon SIPP regular income withdrawal instruction 	Please contact us to request this form.
Amend regular savings (employee/ employer & personal)	<ul style="list-style-type: none"> Aegon SIPP regular contribution form 	https://intermediary.aegon.co.uk/content/dam/common/documents/aegon-sipp-regular-contribution-form.pdf
UFPLS	<ul style="list-style-type: none"> Uncrystallised funds pension lump sum payment instruction form 	Please contact us to request this form.
Transfer out	<ul style="list-style-type: none"> Aegon Self-invested Personal Pension (Aegon SIPP) transfer out to another registered pension scheme 	https://www.cofunds.aegon.co.uk/content/dam/ap-content/documents/aegon-self-invested-personal-pension-transfer-out.pdf
	<ul style="list-style-type: none"> Overseas transfer form 	https://intermediary.aegon.co.uk/content/dam/common/documents/overseas-transfer-form-aegon-platform.pdf

The table below details which forms you'll need to manage your client maintenance for the Aegon Sipp. All forms are available on the Aegon Platform Document Library at <https://intermediary.aegon.co.uk/content/help-and-support.html?tab=document-library>

Application type	Digital form/online process	Digital form link
Ad hoc and ongoing adviser charges	<ul style="list-style-type: none"> Online process 	
Updating client information (name/address etc)	<ul style="list-style-type: none"> Change of customer details form 	https://intermediary.aegon.co.uk/content/dam/common/documents/change-of-details-form-ap-aegon-platform.pdf
Nominating beneficiaries	<ul style="list-style-type: none"> Death benefit nomination/expression of wish form 	https://intermediary.aegon.co.uk/content/dam/common/documents/death-benefit-nomination-form-aegon-platform.pdf

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