

AJ BELL INVESTCENTRE SIPP REGULAR INVESTMENT AMENDMENT FORM

for existing clients

This form is used to amend your regular investments into an existing AJ Bell Investcentre SIPP on the Aegon Platform.

This form is not to amend your existing regular pension contributions being paid to your SIPP. Amending the regular investment on Aegon will not change the amount collected for your regular pension contributions.

If you wish to start, amend or cancel a regular pension contribution payment, please speak to your adviser/intermediary.



Please complete this form and return it to:

**AJ Bell Investcentre, 4 Exchange Quay, Salford Quays,
Manchester M5 3EE**

Section 1

Client details

1A. Existing client details

Product number

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

Full forename(s)

Surname

Date of birth / / Male Female

FATCA For tax purposes, are you resident anywhere other than the UK? Yes No

If 'Yes' – please download and complete the Individual self-certification form on our website and attach to this form.

For existing Aegon clients, we just need product number, name, FATCA information and date of birth.

When completing date fields please use the usual **DD/MM/YYYY** format.

1B. New client address details

Permanent residential address

Postcode

Previous address
If time at current address is less than two years

Postcode

For existing Aegon clients who have a new address, use this section to tell us.

To place investments available through Aegon, your current permanent residential address must be in the United Kingdom.

Section 2

Investment strategy amendment details

2A. Total regular investment

Please enter your existing and new regular investment amounts here.

Existing regular investment amount £

New regular investment amount £

Cancel current regular investment amount - please complete Section 4

Cancellation requests must be received five business days prior to the 11th of the month to be cancelled within the same month.

Only complete this section if you wish to amend the regular investment amount.

If you wish to amend the funds your existing regular investment is in you should complete an **investment strategy instruction**, available from the Aegon website, to amend your fund choices.

Section 3 **Adviser/Intermediary details (for adviser/intermediary use only)**

Intermediary name
Firm name

Section 4 **Authorisation**

I hereby authorise Aegon to amend my regular investment amount into collective investments on the Aegon Platform as indicated in the previous sections.

Client signature Date / /

Section 5 **Charge authorisation**

5A. I confirm that

Please sign below to confirm that in addition to the declarations above:
I confirm that I have been provided with the Aegon Platform terms and conditions and the supplement for the AJ Bell Investcentre SIPP and, by submitting this application form, I agree to be bound by them.

I understand that the Aegon Platform terms and conditions and the supplement for the AJ Bell Investcentre SIPP sets out the standard terms upon which Aegon intends to rely, and it is important that I should read and understand the terms before agreeing to be bound by them. If there is any term or point I do not understand or do not wish to be bound by, I understand that I can request further information before signing this application.

I confirm that I have been provided with the Key Investor Information Document. I understand and accept that there is an annual charge for using the Aegon Platform.

I authorise Aegon to collect the proportion of the annual charge relating to my AJ Bell Investcentre SIPP from my product cash facility.

If there is insufficient money in my account, I authorise the Aegon to sell enough of my platform assets to pay the annual charge in accordance with the Aegon Platform Terms and conditions and the supplement for the AJ Bell Investcentre SIPP. I also understand and accept that this may result in commission-included share class funds being sold to cover this annual charge.

I understand and accept that if the fund(s) selected in this form is not available to my adviser, Aegon will automatically select a comparable fund available to my adviser when processing my application. I understand and accept that I am entitled to cancel my application in accordance with the Key Features applicable to the product I am investing

in and that if I chose to cancel my application, my investment shall be subject to market movement during the period from the date when my application is processed to the date my investment is sold.

Aegon will accept authority from the primary holder only, in most circumstances. For trusts and Powers of Attorney more than one signature may be required.

If there is insufficient money within the relevant payment account, I authorise Aegon to sell enough of my platform assets to pay the service charge in accordance with the Aegon Platform terms and conditions or the supplement for the AJ Bell Investcentre SIPP applicable to my investments/assets. I understand and accept that this may result in commission-included share class funds being sold to cover the service charge.

5B. I agree

- That the annual charge is payable by me; and
- To Aegon collecting the annual charge from my product cash facility. I understand and accept that if there is insufficient cash within my product cash facility, Aegon will sell funds from within the SIPP, without providing me with any prior notice.

Client signature Date / /

Aegon is a brand name of both Scottish Equitable plc (No. SC144517) registered in Scotland, registered office: Edinburgh Park, Edinburgh EH12 9SE, and Cofunds Limited, Registered in England and Wales No.3965289, registered office: Level 43, The Leadenhall Building, 122 Leadenhall Street, London, EC3V 4AB. Both are Aegon companies. Scottish Equitable plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Cofunds Limited is authorised and regulated by the Financial Conduct Authority (FCA). Their FCA Financial Services Register numbers are 165548 and 194734 respectively.