

# Cofunds Pension Account Adviser Charging Fee Model Affirmation form

This form should be used by advisers to gain their client's signed affirmation of one-off and ongoing adviser charges relating to their existing Cofunds Pension Account. Before submitting this form to Aegon, the adviser must ensure that they have assigned their client to the appropriate fee model online.

Please complete this form using black ink and BLOCK CAPITALS and return it to: Aegon Cofunds Administration, PO Box 17491, Edinburgh, EH12 1PB

## 1 Adviser Details (For adviser use only)

Adviser name

Firm name

## 2 Investor Details

Product number

8

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

Full forename(s)

Surname

## 3 Adviser Charging

Please note: all information entered below must be consistent with the charge your adviser will assign you.

### 3A. ONE-OFF

I authorise Aegon to pay my adviser a one-off advice charge of: £  or  %

### 3B. ONGOING

Charge model name

Ongoing advice charge of: £  or annual percentage rate  % or tiered percentage rate  %

Any ongoing advice charge will be taken monthly in arrears from the cash facility of your pension. For example, if you wish to charge £50 per month, please enter £600 as the ongoing amount. If you have selected to charge a tiered percentage rate please enter the highest applicable percentage rate that applies to the charge.

## 4 Declaration

I hereby affirm the agreed adviser charges set out above.

I confirm that any adviser charges are genuinely commercial arrangements between myself and my adviser and only relate to pensions advice and services provided.

Client name

Signature  Date