



Aegon General Investment Account joint holders form

In this form, Aegon means Cofunds Limited.

You should use this form to add and/or remove joint holders (the “existing joint holders”) for an existing Aegon General Investment Account (GIA). You can’t use this form to remove all joint holders for an Aegon GIA where that would result in there being no holder remaining. If you want to change the personal details of a joint holder you should complete a Change of personal details form.

If you wish to change the primary account holder, please complete an Asset transfer form which is available from the Aegon website.

How to complete this form:

Please complete section 1, 4, 5 and section 2 and/or 3 that apply to you.

Section 2 – complete this section if you wish to add additional joint holder(s) to the Aegon GIA detailed in section 1. New joint holders will need to complete and sign section 5.

Section 3 – complete this section if you wish to remove existing joint holder(s) from the Aegon GIA detailed in section 1. Existing joint holders being removed will need to complete and sign section 5.

You should complete a separate form for each Aegon GIA that you want to change joint holder(s) on.

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

Whenever you see this icon , we’re asking you to send us additional material with this form.

1. Customer details

The customer who is the primary account holder must complete this section.

Existing Aegon GIA number (“the Aegon GIA”)

8							
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Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

or, Company name

Date of birth

D	D	M	M	Y	Y	Y	Y
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2. Adding new joint holders

An Aegon GIA can have up to three joint holders in addition to the primary holder. All correspondence will be sent to the primary holder.

Each new joint holder should fully complete this section to be added to the Aegon GIA detailed in section 1.

2.1 New joint holder

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

Full forename(s)

Surname

or, Company name

Date of birth

D	D	M	M	Y	Y	Y	Y
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2.2 Is this new joint holder an existing Aegon Platform customer?

No – go to 2.3

Yes – tell us your existing customer number, add any further joint holders using this section and go to section 3 (if applicable).

3							
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2.3 New joint holder personal details

Permanent residential address

Postcode

Gender

Male Female

National Insurance Number

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The new joint holder doesn't have a National Insurance Number

Email address

We'll 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.

For tax purposes, are you resident anywhere other than the UK?

No

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

2. Adding new joint holders – continued

2.4 New joint holder

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

Full forename(s)

Surname

or, Company name

Date of birth

D	D	M	M	Y	Y	Y	Y
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2.5 Is this new joint holder an existing Aegon Platform customer?

No – go to 2.6

Yes – tell us your existing customer number, add any further joint holders using this section and go to section 3 (if applicable).

3							
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2.6 New joint holder personal details

Permanent residential address

Postcode

Gender

Male Female

National Insurance Number

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The new joint holder doesn't have a National Insurance Number

Email address

We'll 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.

For tax purposes, are you resident anywhere other than the UK?

No

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

2. Adding new joint holders – continued

2.7 New joint holder

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

Full forename(s)

Surname

or, Company name

Date of birth

D	D	M	M	Y	Y	Y	Y
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2.8 Is this new joint holder an existing Aegon Platform customer?

No – go to 2.9

Yes – tell us your existing customer number, add any further joint holders using this section and go to section 3 (if applicable).

3							
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2.9 New joint holder personal details

Permanent residential address

Postcode

Gender

Male Female

National Insurance Number

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The new joint holder doesn't have a National Insurance Number

Email address

We'll 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.

For tax purposes, are you resident anywhere other than the UK?

No

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

3. Removing existing joint holders

Please complete this section, if applicable, for each joint holder you wish to remove from the Aegon GIA.

3.1 First joint holder to be removed

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

Full forename(s)

Surname

or, Company name

Date of birth

D	D	M	M	Y	Y	Y	Y
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3.3 Third joint holder to be removed

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

Full forename(s)

Surname

or, Company name

Date of birth

D	D	M	M	Y	Y	Y	Y
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3.2 Second joint holder to be removed

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

Full forename(s)

Surname

or, Company name

Date of birth

D	D	M	M	Y	Y	Y	Y
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4. How we treat your personal information

Here at Aegon, we're committed to protecting and respecting your privacy. We collect your personal information so that we can verify your identity, set up your plan and provide ongoing administration. We need this information to carry out our obligations and to provide you with the products and services under the terms of your contract with us. Without it, we wouldn't be able to provide you with a plan.

As part of our administration process, we work with carefully selected service providers (in other words suppliers) that carry out certain functions on our behalf. We only share the appropriate level of personal information necessary to enable our suppliers to carry out their services and they need to keep the information safe and protected at all times. Our suppliers must only act on our instructions and can't use your personal information for their own purposes.

The personal information we collect may be transferred to, and stored at a destination outside the European Economic Area (EEA). This could be to other companies within the Aegon Group or to our service providers. Where any such processing takes place, appropriate controls are in place to make sure your information is protected.

We may disclose your information to licensed credit reference and/or fraud prevention agencies to help make financial or insurance proposals and claims decisions (this will be during the application or enrolment process and on an ongoing basis), for you and anyone you're linked with financially or other members of your household. Our enquiries or searches may be recorded.

You can find more information on how we use and share your personal information, including how long we keep it and details of your rights at customerdashboard.aegon.co.uk/site-info/privacy-and-cookie-policy/ or by contacting us to request a copy.

We'd like to keep you up-to-date with information about our news, products and services. If you'd like to hear more from us, please tick the relevant box below.

	Primary account holder	Second account holder	Third account holder	Fourth account holder
Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

By ticking the box(es), you're consenting to receiving marketing messages in this way from us. You can change your mind and unsubscribe at any time simply by contacting us. For more information on how to do this go to customerdashboard.aegon.co.uk/site-info/privacy-and-cookie-policy/

We won't pass your information to other companies outside of the Aegon Group for marketing purposes.

5. Joint holder declaration

All continuing joint holders, all joint holders being removed and all new joint holders should complete and sign this declaration.

5.1 The existing joint holders of the Aegon GIA wish to add the individual(s), trustees and/or company(ies) listed in section 2 as new joint holders of the Aegon GIA. By signing this declaration, those individual(s), trustees and/or company(ies) agree to be joint holders of the Aegon GIA.

5.2 The existing joint holders of the Aegon GIA wish to remove the individual(s), trustees and/or company(ies) listed in section 3 as joint holders of the Aegon GIA. By signing this declaration, those individual(s), trustees and/or company(ies) agree to be removed as joint holders of the Aegon GIA.

Existing account holder signature(s)

Date

D	D	M	M	2	0	Y	Y
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Capacity

Primary account holder signature

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Capacity

Second joint holder signature

Date

D	D	M	M	2	0	Y	Y
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Capacity

Third joint holder signature

Date

D	D	M	M	2	0	Y	Y
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Capacity

Fourth joint holder signature

5. Joint holder declaration – continued

New joint holder signature(s)

Date

D	D	M	M	2	0	Y	Y
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Capacity

Signature

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Capacity

Signature

Date

D	D	M	M	2	0	Y	Y
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Capacity

Signature

6. Intermediary details (for intermediary use only)

Intermediary name

Firm name

