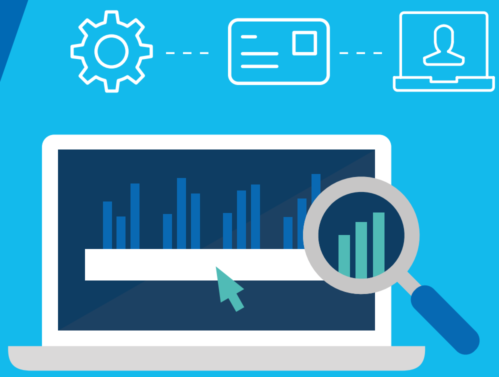
For financial advisers only

How do I… manage regular contributions online for existing clients?

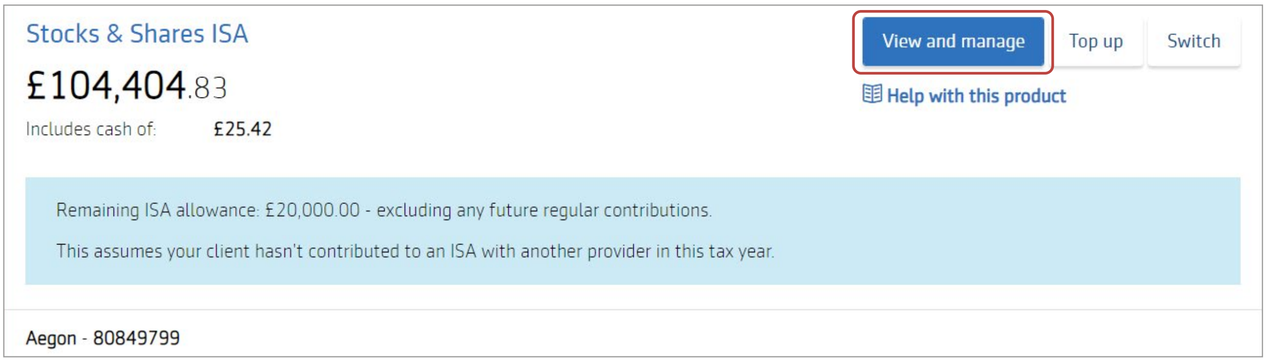


This guide shows you how to manage regular contributions online on the Aegon Platform for your existing clients' general investment account (GIA) and/or ISA.

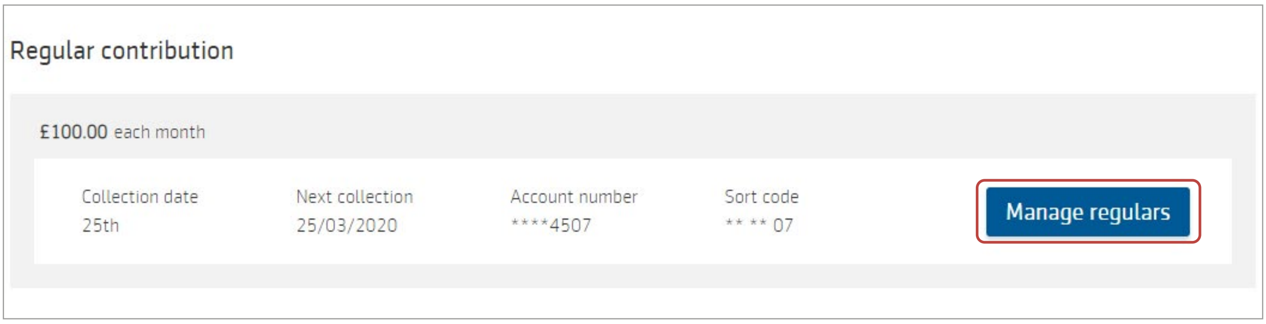
Handy hint
This guide focuses on the steps to change a regular contribution. To cancel the regular contribution, select **Stop regular contribution** and confirm the instruction.

Manage regular contributions online

1 From the client summary screen choose the GIA or ISA you want to manage regular contributions for and select View and manage.

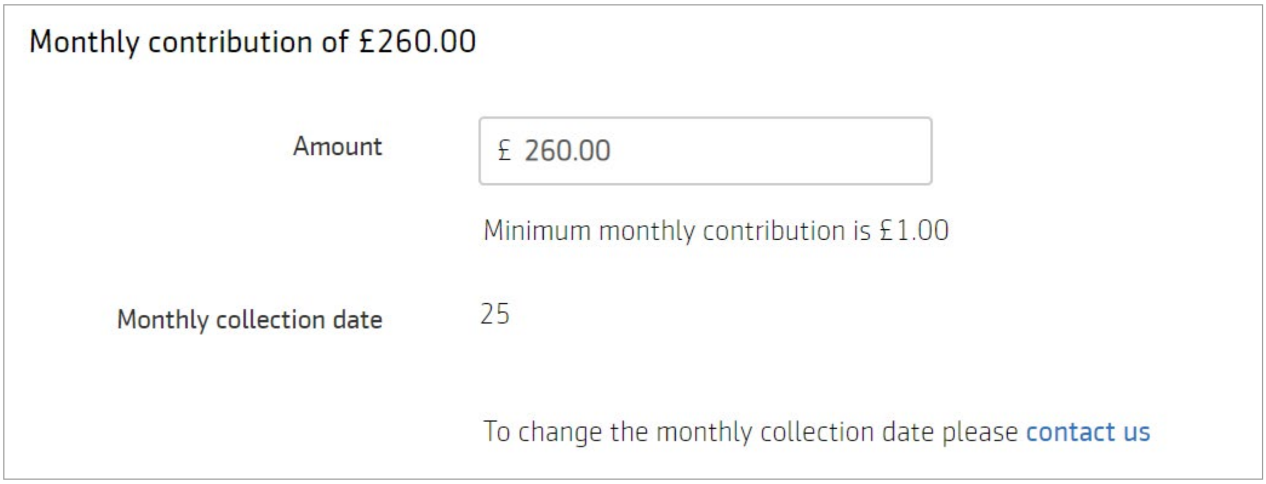


2 Select **Regulars tab** and then **Manage regulars**.



3 You'll see details of the regular contribution. Select **Change**.

4 You can amend the **Amount** online. To change the monthly collection date, you'll need to [contact us]



Handy hint

You can submit changes to your client's contributions at any point throughout the month.

If you submit a change close to a collection date, we'll hold onto the request and deal with it once the collection process completes. If you need to make a further change to your client's contribution during this time you'll need to [contact us]

5 You can then confirm if you'd like to change the funds your client is invested in.

A – No change to funds

1A Select **No** when asked if you want to change the funds.

Do you want to change the funds?

Yes | **No**

If you amend you client's fund choice or investment strategy, we'll cancel their existing direct debit instruction and set up a new one.

Next >

2A In the **Regular contributions investment strategy** options you can view the fund allocation but won't be able to make changes to it.

You're unable to make any changes to the funds. If you'd like to make changes, please return to the Contributions screen and update your choice.

Regular contributions investment strategy

Here you can view and manage your client's regular contributions' investment strategy.

Fund

Kames Abslut Rtrn Bd B Acc GBP — 100.00%

Distribution type: Accumulation **OCF/TER:** 0.68% — £500.00

Do you want to make this your client's default investment strategy? **No** | Yes

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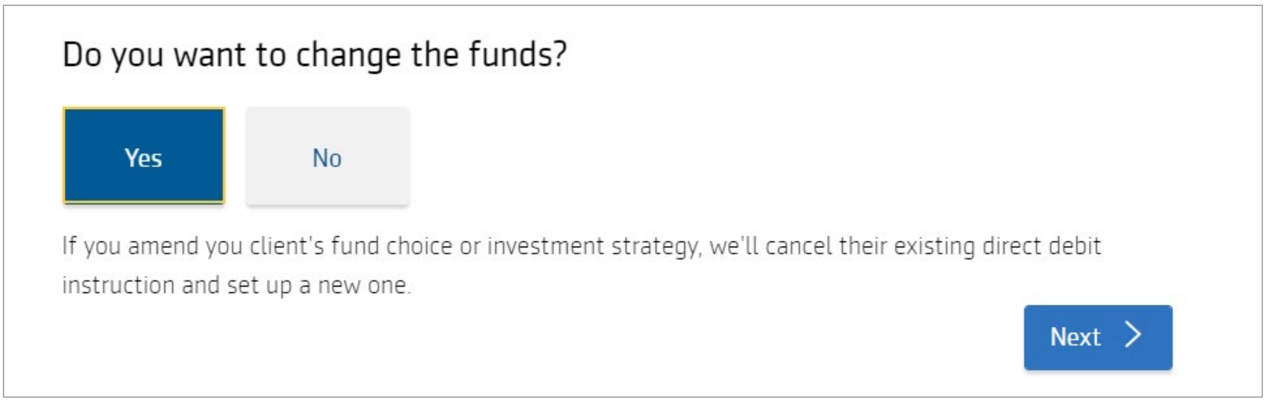
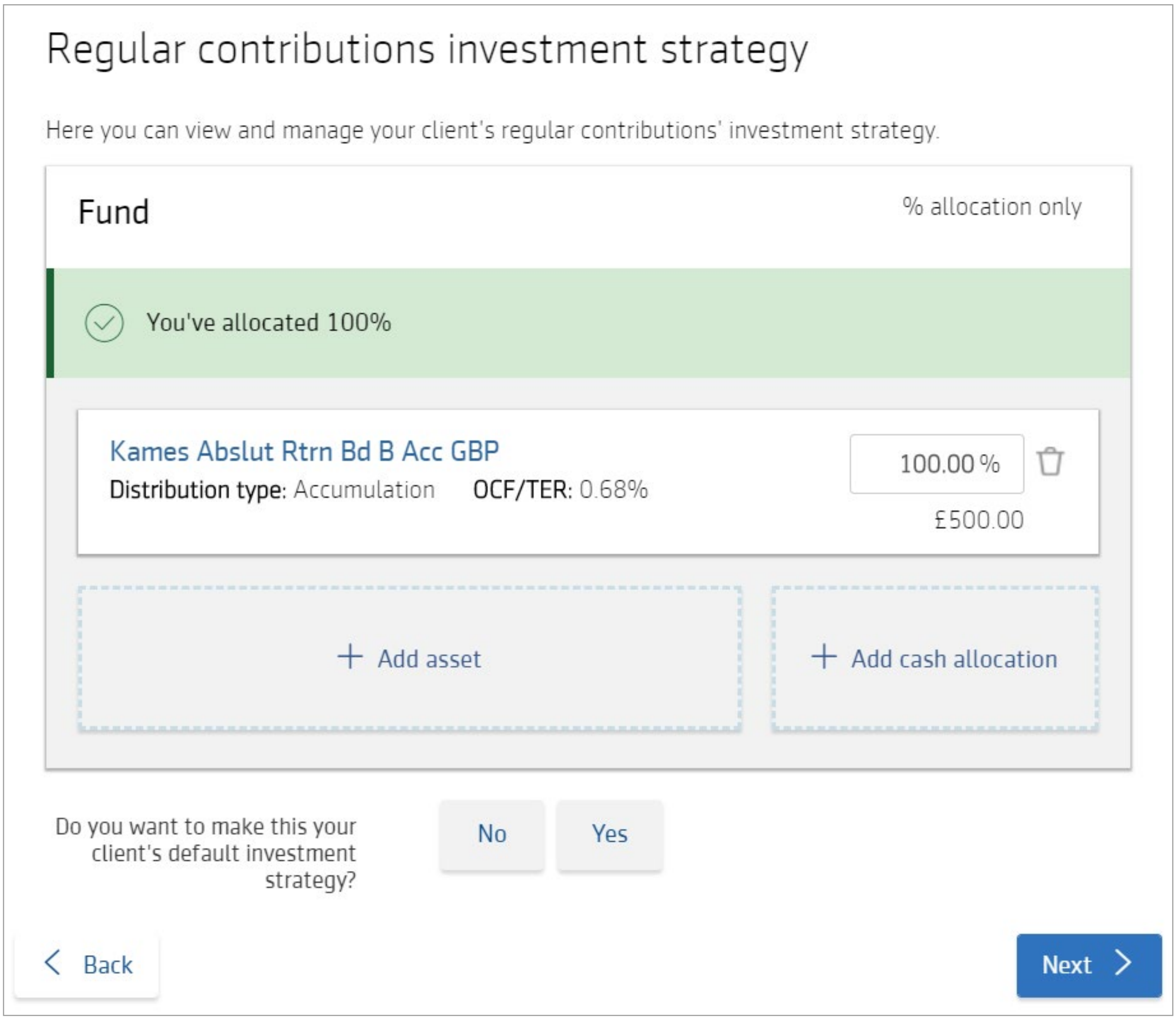
B – Changing the funds

1B Select **Yes** when asked if you want to change the funds.



2B Confirm the advice basis of the transaction and then in **Regular contributions investment strategy** you can view and manage the funds.



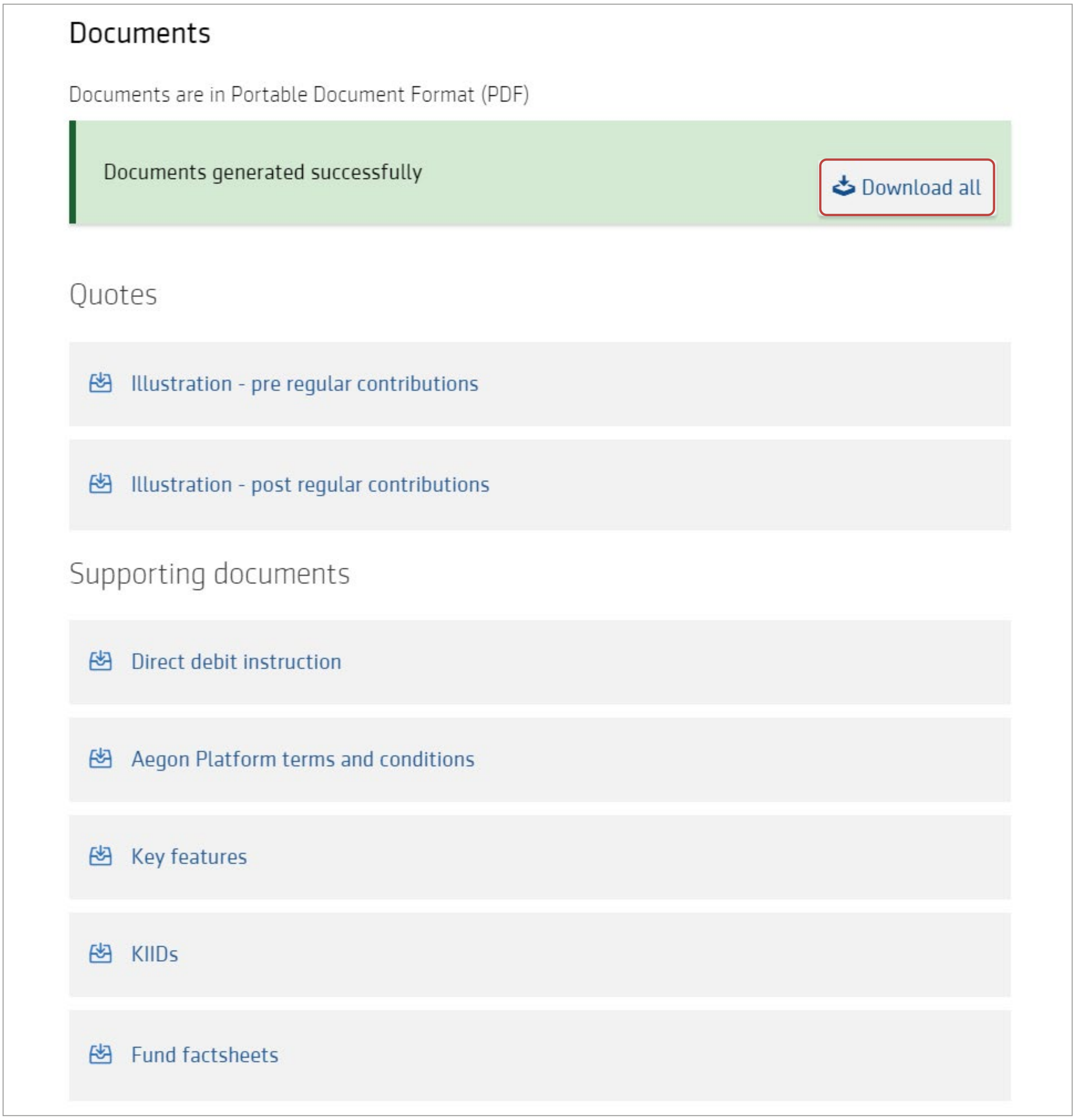
Handy hint

If you update your client's default investment strategy, we'll update any rebalancing requests to the new investment strategy.

If your client has rebalancing set up, we'll sell any existing funds not in the new default investment strategy at the next rebalancing date.

6 On the payments screen you can review the direct debit details. If the details are correct you can select **Next**. You'll need to contact us if you want to make changes to the payment details for the direct debit.

7 You can now view the documents relating to the changes. You can choose to **Download all**.



8 Complete the declaration on behalf of your client and submit the instruction.

If you have any questions speak to your usual Aegon contact or visit cofunds.aegon.co.uk

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