For intermediaries only

Processes on the Aegon Platform

Information correct as at December 2018

To help with your transition from the mainly paper-based Cofunds platform to the upgraded Aegon service, we're phasing in the introduction of some online-only processes over the coming months.

Take a look at the key processes in the table below to find out if you need to go online, contact us or download an application form. We'll continue to update this table each month with the most up-to-date position.

Online processes:

Access and security	Managing your clients	Transacting on behalf of your clients	Managing your fees and charges	Managing your investment proposition
• Forgotten login details • Change security details • Manage user access, roles and permissions	• View and manage prospect and client profiles • Client search • View client summary • View product summary, value and transactions • View client and product documents	• New product applications for GIA and ISA – single contributions, regular contributions[1], re-registrations and ISA transfer • Top up an existing GIA/ISA – single contributions and transfers/ re-registrations • Transfer in an existing GIA/ISA • Switch funds for an existing GIA/ISA and Aegon SIPP • Set up an ad hoc (one off) withdrawal for an existing GIA and ISA • Set up regular withdrawals as part of a new business application for GIA and ISA • GIA to ISA switch (individual clients only) • Set up and manage regular contributions for existing GIA and ISA products (you can cancel the regular contribution online, you can't make changes just before or after the next collection date).[1]	• Manage charges – ongoing advice and service, and ad hoc charges • Manage charges by direct debit or nominated fund	• Fund research • Model portfolio management (including ad hoc individual and bulk rebalancing) • Fund panel management • Portfolio scan • Capital gains tax tool • Reports and management information

[1] New feature now available online

Interim paper-based processes:

Transaction	Process
New product applications for Aegon SIPP: • New business (accumulation) • Top up and transfer in • Immediate drawdown • Drawdown-to-drawdown transfer • Benefit crystallisation	Please use the relevant form from the website: Aegon SIPP application form Aegon SIPP top up application form Aegon SIPP full immediate drawdown form Aegon SIPP drawdown to drawdown transfer form Aegon SIPP benefit crystallisation event application form
Set up and manage regular contributions for Aegon SIPP	Please download and complete the product application form for Aegon SIPP including the 'regular monthly contributions' section
GIA to ISA switch (joint clients)	Please download the Withdrawal from an Aegon General Investment Account (GIA) into an existing Aegon ISA form, for either intermediaries or customers
Set up and manage regular withdrawals and distribution options for existing GIA and ISA products	Please download and complete the Change to product details form completing all sections that apply

How to contact us

Visit: cofunds.aegon.co.uk

Call: 0345 604 4001

Telephone lines are open Monday to Friday 8:30am to 5:30pm. Calls may be recorded for training and quality purposes. Call charges will vary.