

Regular investment strategy instruction (for third party pension products)

Use this form to amend the fund selection within a regular contribution investment instruction.

This form is only to be used by clients with an existing regular contribution investment instruction within their AJ Bell Investcentre SIPP, Suffolk Life Trustees or Suffolk Life Annuities product that was set up prior to May 2018. If your client has a default investment strategy that was set up in May 2018 and after, please use the Investment strategy instruction form which is available from the Aegon website.

This form should only be used to amend the fund choice into which the regular monthly contributions are invested.

How to complete this form:

Please complete this form by typing in the boxes, including the signature box(es) and email it to:

aegoncofundsadministration@aegon.co.uk Our email system and the way we deal with data internally is secure. However, we're unable to ensure the security of emails before they reach us. Please consider this when sending us sensitive information.

If preferred, you can complete this form in BLOCK CAPITALS in ballpoint pen and post it to: Aegon Cofunds Administration, PO Box 17491, Edinburgh, EH12 1PB

If you'd like a large print, Braille or audio CD version of this document, please contact us on 0345 604 4001 (call charges will vary) or email aegoncofundsadministration@aegon.co.uk We're always here to help so if you need some additional support from us please let us know.

1 Customer details

Product number

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

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Full forename(s)

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Surname

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Date of birth

D	D	M	M	Y	Y	Y	Y
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2 Regular investment strategy instruction

2.1 Please use the investment choices shown below as the new investment strategy for regular monthly contributions into the pension product shown above. This will replace any existing regular contribution investment strategy.

Full investment manager name, fund investment and share class	SEDOL code (this is shown in your Key Investor Information Documents (KIIDs))	% to be invested
		%
		%
		%
		%
		%
		%
		%
		%
		%
Product cash facility	N/A	%
Total	N/A	100%

Please tick this box to remove the existing regular contribution investment strategy from the wrapper noted in section 1. By removing the regular contribution investment strategy, regular contributions will be placed into cash unless there is a default investment strategy in place.

3 Intermediary details

Intermediary name

Firm name

Financial Services register number (firm)

Firm address

Postcode

3 Intermediary details – continued

I, the intermediary for the customer set out in section 1, instruct you to change the regular contribution investment strategy for the product numbered in section 1 to the investments set out in section 2 in accordance with this instruction and the Aegon Platform terms and conditions.

You should sign and date this form by typing your full name in the signature box below and typing the date in the date box. Your typed name in the signature box will be your signature. When you sign the form, by typing your name in this box, you are making the declarations and confirming that you wish to proceed with the instructions in this form.

Date

D	D	M	M	Y	Y	Y	Y
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Intermediary signature (type name here)

X	X
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