

# Change of intermediary form

In this form, Aegon means:

- Cofunds Limited where your request is in respect of an Aegon General Investment Account (GIA) or an Aegon ISA, and/or
- Scottish Equitable plc where your request is in respect of an Aegon SIPP.

This form is to be used to appoint a new intermediary to administer your investments on the Aegon Platform in place of any existing intermediary. Your new intermediary must be registered on the Aegon Platform to administer your investments. If they aren't registered they will need to enter into an agreement with us to use the Aegon Platform before they can administer your investments.

You can only appoint a new intermediary to products that, if applicable, have the same joint holders. If you want to appoint a new intermediary to a product that has a different set of joint holders you must complete another form for that product.

If your new intermediary works for the same intermediary firm, with the same FCA reference number, as your current intermediary your old intermediary may sign this form on your behalf.

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

## 1. Customer details

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### 1.1 Personal details

Customer number

3							
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Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
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**For Aegon GIA only**

Company name (if applicable)

Scheme name (if applicable)

Designation (if applicable)

### 1.2 Product details

Provide the product numbers for the products you wish to change to your new intermediary, where the products have more than one owner, all products listed must have the same joint holders.

Product number

8							
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Product number

8							
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Product number

8							
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Product number

8							
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## 2. Joint holder details

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Use this section to detail all joint holders of all products listed in section 1.2. All joint holders must sign the customer declaration in section 4. If a joint holder of any of these products wants to change their intermediary on any other products held in their own name they must complete a separate Change of intermediary form in their own right.

### Second holder

Customer number

3							
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Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
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### Third holder

Customer number

3							
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Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
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### Fourth holder

Customer number

3							
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Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
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## 3. New intermediary details

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If your new intermediary works for the same firm as your current intermediary (with the same FCA reference number) they may sign this form on your behalf.

Intermediary name

Firm name

(the 'new intermediary')

- The new intermediary works for the same firm as my current intermediary (with the same FCA reference number).
- The new intermediary works for a different firm (with a different FCA reference number to my existing intermediary). All customers named in this form must complete and sign section 4.

## 4. Customer declaration

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In this declaration, 'I', 'my', 'we' or 'our' means the customer(s) described in section 1 and, where relevant, all joint holders set out in section 2.

I/we, instruct Aegon to change the intermediary on my/our product(s) listed in section 1, to the new intermediary set out in section 3 and to remove any intermediary currently shown on Aegon's records under these products.

I confirm that all adviser charges and/or service charges currently being deducted from my/our products listed in section 1 to any intermediary currently shown on Aegon's records under these products should stop with immediate effect.

Date

D	D	M	M	2	0	Y	Y
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Capacity

Customer/primary holder signature

Date

D	D	M	M	2	0	Y	Y
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Capacity

Second holder signature

Date

D	D	M	M	2	0	Y	Y
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Capacity

Third holder signature

Date

D	D	M	M	2	0	Y	Y
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Capacity

Fourth holder signature

## 5. Intermediary declaration

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Where the new intermediary works for the same firm as the current intermediary recorded on the products listed in section 1 (with the same FCA reference number) . 'We' means the intermediary firm named in section 3.

We instruct Aegon to change the intermediary on the product(s) listed in section 1, to the new intermediary set out in section 3 and to remove any intermediary currently shown on Aegon's records under these products.

We confirm that we have the authority of the customer(s) described in section 1 and, where relevant, all joint holders set out in section 2, to give this instruction to Aegon and we will provide Aegon with evidence of that authority upon being asked by them to do so.

To be signed by an FCA registered director, partner or sole trader as appropriate.

Date

D	D	M	M	2	0	Y	Y
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Name of director/partner/sole trader

Position

Contact number

Signature

