

2. Product details

Please tell us which products you would like merged.

First product number

This will stay as your product number once the merge is complete.

Second product number

This product will be closed once the merge is complete.

Third product number

This product will be closed once the merge is complete.

Fourth wrapper number

This product will be closed once the merge is complete.

If you have different distribution selections for each product, we'll retain the selection for the first product. So, for example if you selected 'retain in fund' for the first product, and 'consolidated natural income' for the second product, once the merge is complete, your income distributions, if applicable, will be retained within the funds. Any direct debits set up against the products being closed will be automatically transferred.

3. Adviser details (for adviser use only)

Adviser name

Firm name

If you'd like to take an ad hoc adviser charge for this transaction, amend your client's ongoing adviser charge or service charge, use your Aegon Platform account.

4. Declaration

I/We, the person(s) named in section 1, agree to transfer the investments listed in section 2 of this form. 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 or by using any other electronic signature method we have agreed, in writing with your adviser, to accept. Your typed name or agreed electronic signature method in the signature box will be your signature. When you sign the form, by typing your name in this box or using the agreed electronic signature method, you are making the declarations and confirming that you wish to proceed with the instructions in this form.

Customer

Date

Print name

Signature (type name here)

All joint Aegon GIAs holders must sign

Additional joint holder one

Date

Print name

Signature (type name here)

For companies only

This section should only be completed by companies.

Primary holder signature (type name here)

Capacity in which declaration is made (for example owner, trustee, authorised signatory)

Date

Third holder signature (type name here)

Capacity in which declaration is made (for example owner, trustee, authorised signatory)

Date

Additional joint holder two

Date

Print name

Signature (type name here)

Additional joint holder three

Date

Print name

Signature (type name here)

Second holder signature (type name here)

Capacity in which declaration is made (for example owner, trustee, authorised signatory)

Date

Fourth holder signature (type name here)

Capacity in which declaration is made (for example owner, trustee, authorised signatory)

Date

