



For Aegon Platform customers

Welcome to your Aegon
Dashboard (view and transact)

Our Aegon Dashboard is designed to help you add to, and manage your investments, giving you a greater understanding of your finances. It lets you see how your investments are performing as well as helping you and your advisers make decisions about what to do next.

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CD version of this document, please call 0345 604 4001 (call charges will vary) or visit aegon.co.uk/onlineform.

Access your Aegon Dashboard whenever, wherever – it's fully online and available on desktop, mobile or tablet.

Making investing easier

The dashboard is full of helpful information that can support you throughout your investing journey. You can also quickly access online valuations and view and track the performance of your investments.

And it doesn't stop there. By selecting **View & Manage** you'll see a more detailed view of your product, under three tabs – **Overview**, **Transactions** and **Documents**.

Investments

Ind17602FirstName.Ind26136.LastName
Last signed in - 16:16 BST 05/07/21

Your total investments
£3,557,984.67
as of 01 August 2021

GIAs	91.79%
Pensions	6.75%
ISAs	1.46%

Your latest status updates | Your investment breakdown

Investment returns are not guaranteed. The value of investments may go down as well as up and you may get back less than you invested.

Stocks and Shares ISA
£51,857.72
[Find out your remaining ISA allowance](#)

Aegon - 80949998

General Investment Account (GIA)
£3,265,952.35

Aegon - 80685012

View & Manage

Overview | Transactions | Documents

Tax year allowance limit

You can still invest £18,500.00 into your ISA from [this tax year's ISA allowance](#) (starting from 6 April). This is assuming you have no other ISA for this tax year. You can find out more about ISAs in our [Guide to ISAs](#).

Your investments

Fundsmith Equity I Acc	38.12%
VT Chelsea Mgd Aggr Gth A Acc GBP	19.70%
Marlborough UK Micro Cap Gwth P Acc	19.04%
GS India Eq Pfl R GBP	14.36%
Artemis Global Income I Inc	8.78%
Cash	0.00%

Investment valuation as of 09 September 2019

See your transactions as they happen

We've made it easy for you to identify and understand transactions that have happened on your account. You can see a high-level list on your dashboard, but you can also filter the list should you want to look closely at certain transaction types. And, you can download the entire transaction history to Microsoft Excel, making it even quicker to search for the information you need.

Take a look at our [guide to transaction history](#) for more details.

The screenshot displays the Aegon Stocks and Shares ISA dashboard. At the top, the Aegon logo is on the left, and navigation links for 'Investments', 'Help and Support', 'Profile', and 'Sign out' are on the right. The main heading is 'Stocks and Shares ISA'. Below this, the current balance is shown as £51,857.72, with a note 'Including £4.79 available cash' and 'As of 02 August 2021'. There are three main action buttons: 'Top up', 'Switch funds', and 'Manage regulars', along with a 'More options' dropdown. A warning message states: 'Investment returns are not guaranteed. The value of investments may go down as well as up and you may get back less than you invested.' Below this, there are tabs for 'Overview', 'Transactions' (which is highlighted with a red box), and 'Documents'. The 'Transactions' section shows a summary with 'In' at -£40,015.62 and 'Out' at £0.00. A table lists individual transactions with columns for Date, Transaction, In, and Out.

Date	Transaction	In	Out
12 Aug 2020	Income distribution re-investment	£7.95	
30 Jul 2020	Switch		
15 Jul 2020	Switch		
21 Apr 2020	GIA to ISA	£20,000.00	
10 Feb 2020	Income distribution re-investment	£6.71	
16 Dec 2019	Income distribution	£0.96	
12 Nov 2019	Single contribution	£20,000.00	

All your important documents, altogether

We keep all your important documents relating to your investments on the Aegon Platform in one place on your dashboard. So if you're looking for your last statement or need the details of a specific application, you'll find it under the Documents tab.

The screenshot shows the Aegon Stocks and Shares ISA dashboard. At the top, there's a navigation bar with 'Investments', 'Help and Support', 'Profile', and 'Sign out'. The main header displays 'Stocks and Shares ISA' and user information: 'Inst17607/InstName Inst26136/LastName' and 'Last signed in - 16:16 BST 06/07/21'. A large card shows the account balance: '£51,857.72' as of 02 August 2021, including £4.79 available cash. Below this are buttons for 'Top up', 'Switch funds', and 'Manage regulars', along with a 'More options' dropdown. The account number 'Aegon - 80949998' and intermediary 'Donald Adviser 609591' are also visible. A disclaimer states: 'Investment returns are not guaranteed. The value of investments may go down as well as up and you may get back less than you invested.' A navigation bar below the disclaimer has 'Overview', 'Transactions', and 'Documents' (highlighted with a red box). Below this, a message says: 'Here are your most recent personal documents. Please [call us](#) if you've any older documents you need to access.' A search bar is present above a table of documents. The table has columns for 'Date', 'Document', and 'Type'. It lists four documents from 04/06/20, all of type 'Setup': 'Confirmation of Application (PDF 169.0KB)', 'Application Summary (PDF 62.5KB)', 'Illustration (PDF 133KB)', and 'Key Features Document (PDF 76.5KB)'. A 'View more' button and a dropdown showing '25 documents' are at the bottom of the table.

Investments Help and Support Profile Sign out

Stocks and Shares ISA

Inst17607/InstName Inst26136/LastName
Last signed in - 16:16 BST 06/07/21

£51,857.72
As of 02 August 2021
Including £4.79 available cash

Top up Switch funds Manage regulars More options

Aegon - 80949998 Intermediary: Donald Adviser 609591

Investment returns are not guaranteed. The value of investments may go down as well as up and you may get back less than you invested.

Overview Transactions **Documents**

Here are your most recent personal documents. Please [call us](#) if you've any older documents you need to access.

Search table

Date	Document	Type
04/06/20	Confirmation of Application (PDF 169.0KB)	Setup
04/06/20	Application Summary (PDF 62.5KB)	Setup
04/06/20	Illustration (PDF 133KB)	Setup
04/06/20	Key Features Document (PDF 76.5KB)	Setup

View more 25 documents

Help & Support

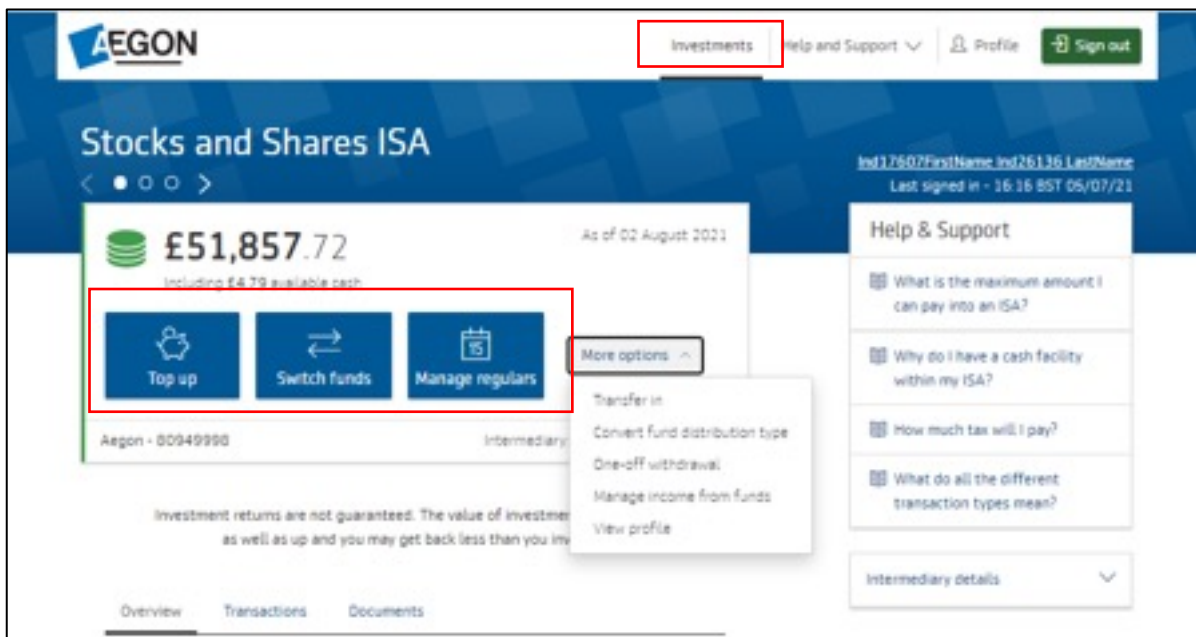
- What is the maximum amount I can pay into an ISA?
- Why do I have a cash facility within my ISA?
- How much tax will I pay?
- What do all the different transaction types mean?

Intermediary details

Transacting through your Aegon Dashboard

There are several different transactions you can perform yourself, completely online for an individual savings account (ISA) and general investment account (GIA):

- Top up
- Switch funds
- Manage regular contributions
- Cash transfer an ISA from another provider
- Convert fund distribution type from accumulation to income
- One-off withdrawal
- Manage income from funds (select whether to hold in cash, reinvest or pay as a lump sum)



Easily update your communication preferences

Use the **Security & Notifications** tab from your **Profile** to select paperless communications and view and change the email address we have registered to your account.

Get started with your Aegon Dashboard

If you and your adviser decide the Aegon Dashboard is right for you, you can request your own activation code at customerdashboard.aegon.co.uk/login

We'll ask you for a few details including your product number and customer number – these are shown on letters we've sent you about your product. But don't worry if you can't find them, your adviser should have a copy.

We'll then send you an activation email and send you an activation code by post. Once you've received both, follow the instructions in your email to complete the activation process – assigning yourself a username, password and security details. From here, you can start to enjoy access to your own Aegon Dashboard.

Although you'll have access to your own investments, your relationship with your adviser will stay the same. It's just that with the Aegon Dashboard, keeping track and managing your investments becomes easier and more straightforward.

Need more help?

If you have any questions you can speak to your adviser or visit aegon.co.uk/support

aegon.co.uk



@aegonuk



Aegon UK



Aegon UK



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