



For customers | Aegon Platform

Aegon Junior ISA transfer authority

In this form, 'I', 'me', 'you', 'your' or 'my' refers to you, the registered contact named in section 5, and 'Aegon', 'we' or 'our' refers to Cofunds Limited.

Use this form to make a transfer from a Junior ISA (JISA) with another JISA account manager into an Aegon JISA. The Aegon JISA is a stocks and shares JISA

You must send this form along with a completed and signed Junior ISA transfer application form.

If you're transferring from more than one JISA account manager, you'll need to send a separate transfer authority for each transfer.

Please make sure you've signed both the application form and the transfer authority.

All the details must match those held by the existing JISA account manager. Any differences could cause delays to the requested transfer.

If you're completing this form electronically, please type in the box(es), including your name in the signature box 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 so please consider this and do not include any personally sensitive, financial or banking information that has not been appropriately secured.

You can also complete this form in black ink and post to: Aegon Cofunds Administration, Sunderland SR43 4DN

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/support

1. JISA account manager details

Account manager name

Product number (of existing JISA to be transferred)

Address

Postcode

2. Investments that you wish to keep via re-registration (stock transfer)

Where investments held with the existing account manager named on this authority are also available for investment within the Aegon JISA, you can choose to transfer those investments by re-registration. We recommend you read our Transfer Guide as part of this transaction. You can find it at aegon.co.uk/transfers it gives you more detail on how the transfer process and any share class conversions works, the time it may take and other important information. You should also ensure you have an illustration that reflects the decisions you're authorising below.

Please list all the investments held with the JISA account manager named on this authority you wish to retain in this way when you transfer the investment to Aegon. Please make sure the investments you choose are available through Aegon and are compatible with your investment service. For more details of your investment service please see the Aegon Platform terms and conditions.

You must transfer the full value of another stocks and shares JISA and may not transfer only part of it.

Full investment manager name and investment name	Sedol code (this is shown in your Key Investor Information Documents (KIIDs))	Account or plan numbers (this must be completed)

3. Investments that you wish to sell (stocks and shares JISA cash transfer)

Where investments that are held with the existing account manager named on this authority are not available for investment within the Aegon JISA or you wish to transfer cash from the existing JISA to the Aegon JISA. You may instruct the existing account manager to sell those investments into cash before transfer into the Aegon JISA.

Please list all investments held with the JISA account manager named on this authority that you wish to sell into cash and transfer to Aegon. Please also complete section 3 of the Junior ISA transfer application form to tell us which investments you'd like to reinvest into.

☐ Sell all my investments

Full investment manager name and investment name	Sedol code (this is shown in your KIIDs)	Account or plan numbers (this must be completed)

4. Cash JISA transfer

If applicable, please indicate either of the following to be transferred into your Aegon JISA:

☐ All my cash, or

☐ An amount of the cash JISA £

Please state the notice period (if any), for you to transfer the cash Junior ISA days

Account number (this must be completed)

Please also complete section 3 of the Junior ISA transfer application form to tell us which investments you'd like to reinvest into.

5. Authorisations

5 a. Re-registration authorisation
Aegon JISA number (if applicable)

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I authorise the JISA account manager named in section 1 to re-register the investments detailed in section 2 and transfer the investments in section 3 in cash when requested to Cofunds Nominees Ltd with immediate effect or where I so instruct at the end of a notice period, and forward the proceeds as specified below to the new Aegon ISA account manager and provide Aegon with any information reasonably required by them to allow them to accept this transfer.

5 b. Conversion to lower charge share class where available

We'll automatically convert re-registered funds into the lowest charge share class available to you.

If you don't want us to convert your re-registered funds, please tick here

☐

If you decide not to convert please ensure you have an up to date illustration that reflects this decision. You can find out more about the transfer and conversion process at aegon.co.uk/transfers.

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.

Full forename(s)

Surname

Date

D	D	M	M	2	0	Y	Y
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Signature (type name here or sign)

X

X



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