

For Aegon Platform customers

# Welcome to your Aegon Dashboard

(view only)



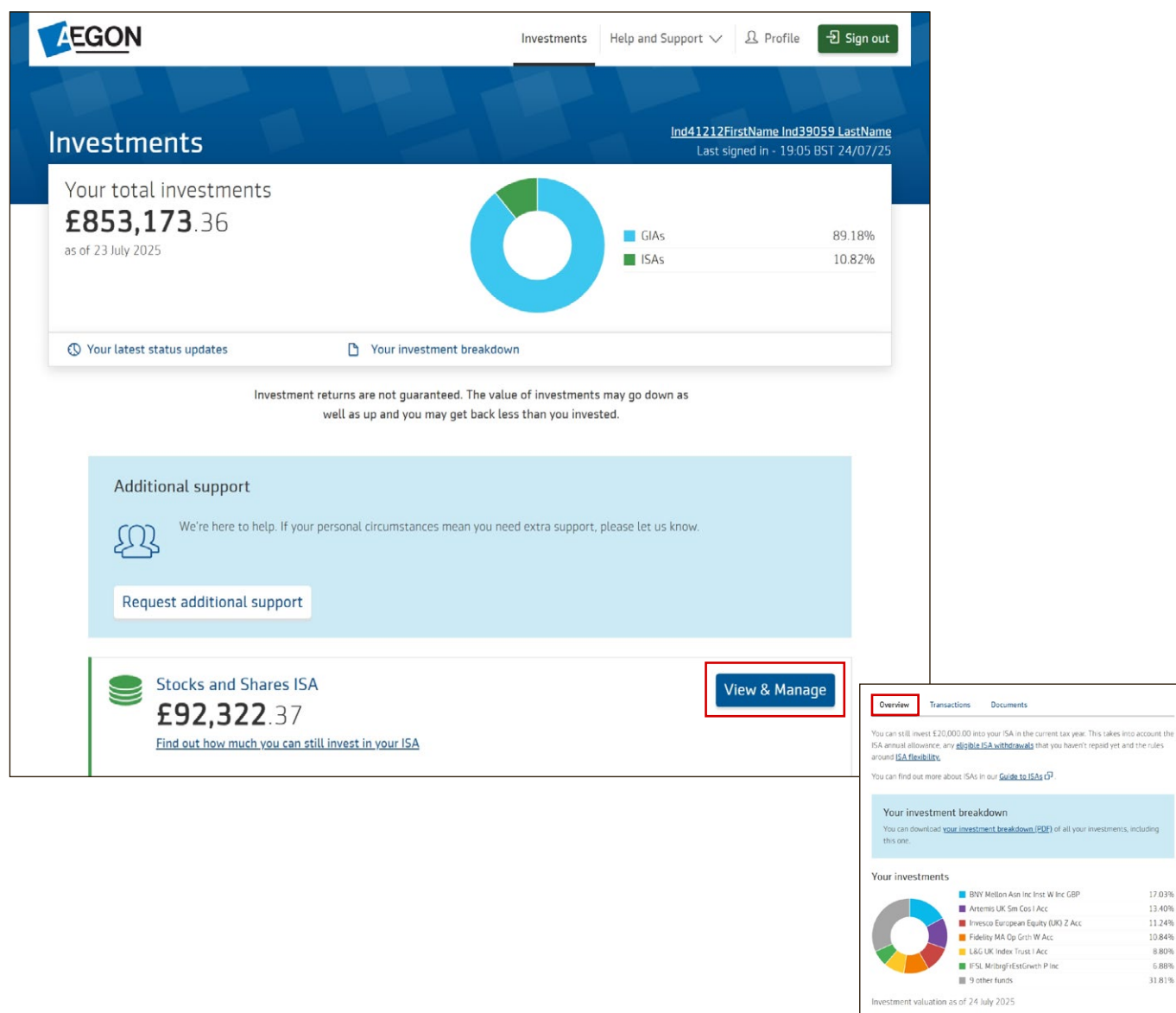
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Access your Aegon Dashboard whenever, wherever - it's fully online and available on desktop, mobile or tablet.

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**.



# 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.

Investments
Help and Support ▾
 Profile
 Sign out

# Stocks and Shares ISA

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**£92,322.37**
Including £1,034.73 available cash

As of 24 July 2025

Top up

Switch funds

Manage regulars

More options ▾

Aegon - 80145202      Intermediary: CommShare

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

Filter

Download

In	<div style="width: 100%;"></div>			+£78,464.19
Out	<div style="width: 100%;"></div>			-£2,324.10
Date	Transaction	In	Out	
05 Mar 2025	Switch			
19 Feb 2025	Investment Deposit	£1,000.00		
09 Jan 2025	Service charge		-£17.87	
09 Jan 2025	Annual charge - monthly amount		-£14.89	
03 Jan 2025	Automated asset sale			
26 Dec 2024	Interest received	£0.13		
13 Dec 2024	Cash adjustment	£6.61		

## 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 ▾

# 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 a 'Sign out' button. The main header displays 'Stocks and Shares ISA' and the user's account details: 'Ind17607FirstName Ind26136 LastName' and 'Last signed in - 16:16 BST 05/07/21'. Below the header, the current balance is shown as '£51,857.72' as of 02 August 2021, with 'Including £4.79 available cash'. There are three main action buttons: 'Top up', 'Switch funds', and 'Manage regulars', along with a 'More options' dropdown. Below these, the account number 'Aegon - 80949998' and the intermediary 'Donald Adviser 609591' are listed. 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.' The 'Documents' tab is highlighted with a red box. Below the tabs, 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: 'Confirmation of Application (PDF 169.8KB)', 'Application Summary (PDF 62.5KB)', 'Illustration (PDF 133KB)', and 'Key Features Document (PDF 76.5KB)', all of type 'Setup'. At the bottom of the table, there is a 'View more' button and a count of '25 documents' with a dropdown arrow.

Date	Document	Type
04/06/20	Confirmation of Application (PDF 169.8KB)	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



## 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\*\*](https://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\*\*](https://aegon.co.uk/support)

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