

For Aegon Platform customers

Welcome to your Aegon Dashboard

(view only)



Our Aegon Dashboard is designed to help you manage your investments, giving you a greater understanding of your finances, lets you see how your investments are performing as well as helping you and your adviser 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 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**.

The screenshot shows the Aegon Dashboard with the following details:

- Header:** Aegon logo, Investments, Help and Support, Profile, Sign out.
- Investments Section:** Your total investments £853,173.36 as of 23 July 2025. A pie chart shows 89.18% in GIAs and 10.82% in ISAs.
- Additional support:** A section with a 'Request additional support' button.
- Stocks and Shares ISA:** £92,322.37. A link to "Find out how much you can still invest in your ISA".
- View & Manage:** A button highlighted with a red box.
- Overview Tab:** Shows you can still invest £20,000.00 into your ISA in the current tax year. It includes a note about ISA annual allowance, ISA withdrawals, and ISA flexibility.
- Your investment breakdown:** A link to download the investment breakdown (PDF).
- Your investments:** A pie chart showing the breakdown of investments across various funds. The data is as follows:

Investment Type	Value	Percentage
BNY Mellon Asn Inc Inst W Inc GBP	£17,030	17.03%
Artemis UK Sm Cos I Acc	£13,400	13.40%
Invesco European Equity (IJO) Z Acc	£11,240	11.24%
Fidelity MA Op Grth W Acc	£10,840	10.84%
L&G UK Index Trust I Acc	£8,800	8.80%
ESL MitrifirstGrowth P Inc	£6,880	6.88%
9 other funds	£31,810	31.81%

Investment valuation as of 24 July 2025.

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.

£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.

Transactions

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

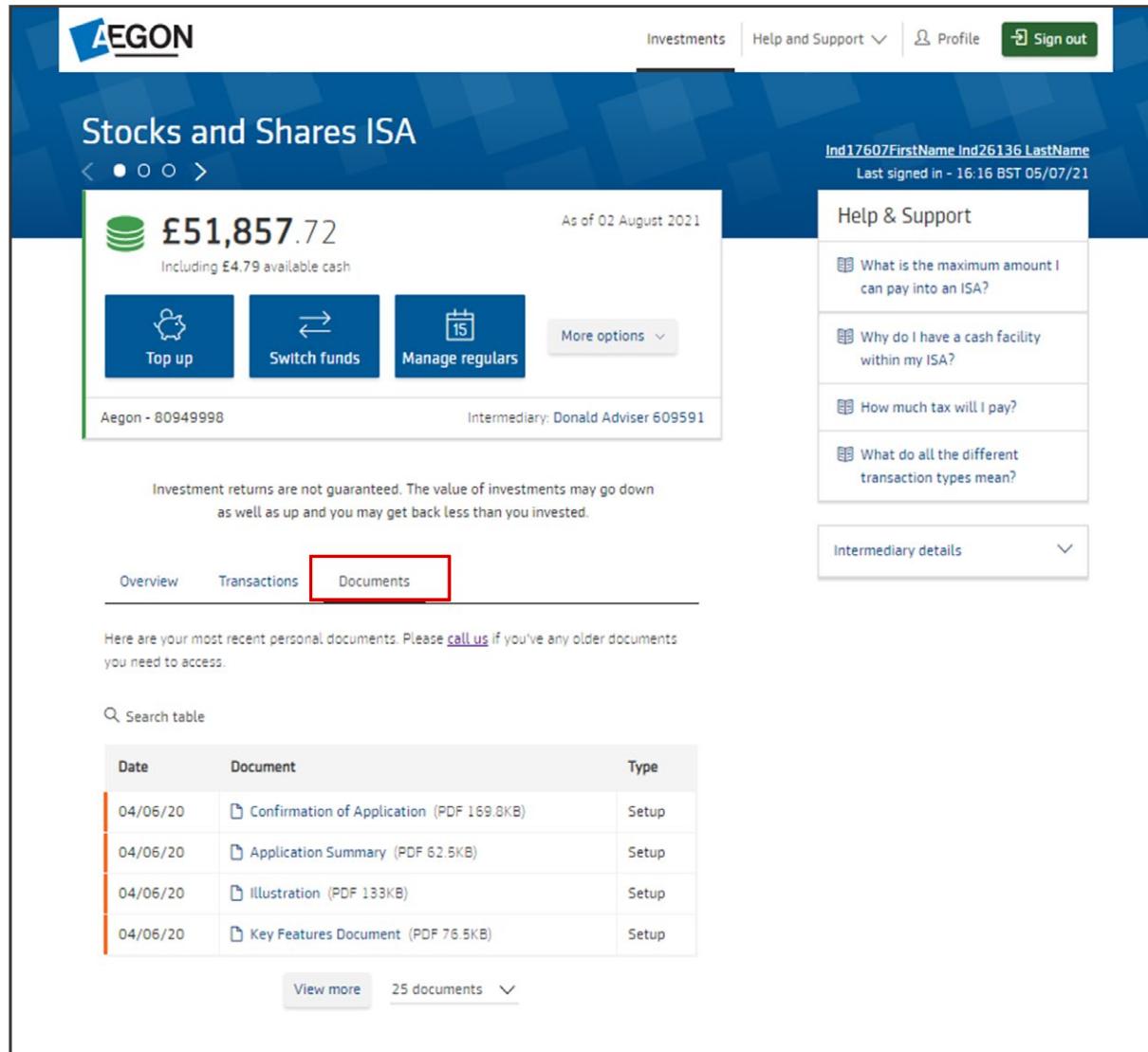
- What is the maximum amount I can pay into an ISA?
- Why do I have a cash facility within my ISA?
- How much tax will I pay?
- What do all the different transaction types mean?

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 Platform dashboard for a Stocks and Shares ISA. The main area displays the current balance of £51,857.72, including £4.79 available cash, as of 02 August 2021. Below the balance are three buttons: 'Top up', 'Switch funds', and 'Manage regulars'. The 'Documents' tab is highlighted with a red box. A message below the balance 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.' To the right, there is a 'Help & Support' section with links to frequently asked questions and 'Intermediary details'.

Date	Document	Type
04/06/20	Confirmation of Application (PDF 169.8KB)	Setup
04/06/20	Application Summary (PDF 52.5KB)	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

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