



For Customers | Aegon Platform

Aegon Junior ISA top up form

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/additionalsupport**

In this form, 'I', 'me', 'you', 'your' or 'my' refers to the registered contact named in section 2, and 'Aegon, 'we', or 'our' refers to Cofunds Limited.

Use this form to top up an existing Aegon Junior ISA ('Aegon JISA') on behalf of a child who is under 18 and living in the UK, or if you are the child and aged between 16 and 18 and have applied to become the registered contact and your application has been accepted. The overall JISA allowance is £9,000 for the 2024/2025 tax year.

You must have been provided with an illustration, together with the Aegon JISA Key Features Document, a Key Investor Information Document and/or Key Information Document for each fund you are investing in before completing and returning this form. If you haven't we will not be able to process your request. Please go to aegon.co.uk/support to download the form Illustration request – Aegon GIA and Aegon ISA. We'll send you the relevant documents along with your illustration.

Please complete this form in BLOCK CAPITALS and in ballpoint pen and return it and any additional information to: Aegon Cofunds Administration, Sunderland SR43 4DN.

Whenever you see this icon *, you may have to send us additional information.

Child details 1. Illustration number Permanent residential address Product number 1.1 8 Postcode Mr / Mrs / Miss / Ms / Other - please specify 1.2 Please tell us: National Insurance number - (if the child is over 16 and holds one) Full forname(s) You should be able to find your NI number on a Surname payslip, form P45 or P60, a letter from HM Revenue & Customs, or a letter from the DWP. Date of birth The child doesn't have a National Insurance Number

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Registered contact details 2.

Registered contact details Mr / Mrs / Miss / Ms / Other – please specify Full forename(s) Surname Date of birth D D M M Y Y Y Y Permanent residential address	Was advice given for this application? Yes No Email address We'll use your email address to contact you about your Aegon JISA. We might also use it to keep you informed about our products and services but only where you've given your consent to this.		
Postcode Top-up details			
The investment into the Aegon JISA will be funded	Cheques must be made payable to Aegon (we'll		

3.1

3.

by: Cheque
Amount
£
Bank transfer
Amount
£

For a Bank transfer you can find our bank details along with your illustration.

Important note: Please ensure for both bank transfers and cheques you give the Aegon JISA product number, or the surname and date of birth as the reference when you make the payment so we can tie it up with their account.

also accept Cofunds Ltd). For a Building Society cheque or banker's draft your name must appear on the front of the cheque, or on the back of the cheque accompanied by the Building Society's or Bank's official stamp and signature.

We might need to know where the money you are investing has come from. If we do, we'll contact you to ask where the money has come from and for documentary evidence of this.

The amount you subscribe is a gift to the child and we can't repay it to the subscriber if at a later date they change their mind.

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Top-up details — continued 3.

account that your money to invest comes from.

3.2 Third Party Details Permanent residential address Complete this section if you're not the child or registered contact but are funding the Aegon JISA. Aegon customer number (if applicable). 3 Postcode Mr / Mrs / Miss / Ms / Other – please specify Full forename(s Surname Date of birth Source of wealth 4. Source of funds Your source of wealth is how you got the money to invest, for example from regular savings from your salary, selling a property or an inheritance payment. Source of wealth Your source of funds is the details of the bank

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5. Investment details

6.

In this section, you need to tell us how you'd like to invest the top up into the Aego	on JISA.	
Use the existing investment strategy.		
Invest as set out in the table below.		
The investments should match the illustration you received from us, if they don't v request. If you wish to choose different investments, you'll need a new illustration		to process your
Full investment manager name, fund name and share class	SEDOL code	% to be invested
		%
		%
		%
		%
		%
		%
		%
		%
Aegon JISA cash facility	N/A	
Total amount	N/A	100%
If you need to add additional funds, please provide the information on a separ above, sign and date it and attach it to this form *. The investment choices you make can be applied to all future investment choices in	in this product.	
Use the investment choices above as my new default investment strategy for product.	all future single	payments into this
Investment income options		
If you have income-generating investments, this section lets you choose how any i those investments should be dealt with when we receive them from the investment instruction you have given us. We'll apply your selection to all income generating in Aegon JISA.	nt provider or cha	ange any existing
Please tick one of the following options:		
Reinvest in fund (default) – reinvest any income received back into the same f	und.	
Leave in cash — pay any income into the Aegon JISA cash facility.		

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7. Adviser details (for adviser use only)

Adviser name		
Firm name		

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

8. Registered contact declaration

In this declaration:

I declare that:

- 8.1 I accept that any payment into the Aegon JISA, including subscriptions and transfers, will be placed in the appropriate cash facility. Thereafter, investments will be purchased in accordance with the investment instructions given by me in section 5 of this additional application form.
- 8.2 I am not aware of other JISA subscriptions that will result in the child named in section 1 of this additional application form exceeding the annual limit as determined by HMRC.
- **8.3** I will not knowingly make subscriptions to JISAs for the child named in section 1 of this additional application form that will result in the subscription limit being exceeded.
- 8.4 The information supplied in this application, and any supplementary forms related to it, including transactional data, is correct and complete to the best of my knowledge and belief. I am aware that it is a serious offence to knowingly provide false or misleading information on the application.

8.5 I have read the Aegon JISA key features, Aegon Platform terms and conditions, Aegon JISA supplement and the key investor information document(s) relating to the funds I would like to invest in.

I agree that:

- 8.6 Where I have indicated in section 5 of this additional application form that I wish to set up a default investment strategy, this single payment and any future single payments to the Aegon JISA will be invested in accordance with the default investment strategy until I advise Aegon otherwise.
- 8.7 Aegon will apply my investment income instructions in accordance with section 6 of this additional application form, and where I have not provided an instruction I acknowledge that you will apply the default position, which is to reinvest the income.

Date

D D M M Y Y Y Y

Registered contact signature



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