



Discretionary fund manager (DFM) – adviser link request

Use this form to allow Aegon to link an adviser firm to your DFM service. Please complete this form by typing in the boxes, including the signature box(es) and email it to arcdfmsandproviders@aegon.co.uk. Please don't email any personal, financial or banking information as it's not a secure method of communication. If you have a dedicated secure email service with Aegon, for example Unipass Maillock, please use this service.

If you don't complete all sections we won't be able to process this form. We'll process your request and confirm when you can link the adviser firm to your models.

DFM name

1. Details of adviser firm

Adviser firm name

Postcode

FCA number

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