



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: apdfmsandproviders@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

--	--	--	--	--	--	--



2. Standard DFM fees for DFM models (if no fee applies please state 0%)

DFM model name	DFM fee (please only use % to 3 decimal places)

If you need additional rows, please complete this section on another form, sign and date it and send it with this form.

3. Declaration

We confirm the information we have provided is correct, accurate and we shall indemnify Aegon against any actions, costs, claims, damages, expenses, demands, liabilities and reasonable legal fees incurred or due to be paid by Aegon as a result of Aegon relying on the information and following the instructions given in this form.

Date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Full name

Position

Signature (type name in box)

X	X
----------	----------



Aegon is a brand name of both Scottish Equitable plc (No. SC144517) registered in Scotland, registered office: Edinburgh Park, Edinburgh EH12 9SE, and Cofunds Limited, Registered in England and Wales No.03965289, registered office: Level 26, The Leadenhall Building, 122 Leadenhall Street, London, EC3V 4AB. Both are Aegon companies. Scottish Equitable plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Cofunds Limited is authorised and regulated by the Financial Conduct Authority (FCA). Their FCA Financial Services Register numbers are 165548 and 194734 respectively. © 2022 Aegon UK plc