



For customers | Aegon Platform

Child Trust Fund to Aegon Junior ISA transfer application form

In this form, 'I', 'me', 'you', 'your' or 'my' refers to you, the registered contact named in section 1, and 'Aegon', 'we' or 'our' refers to Cofunds Limited.

Use this form to transfer funds held in an existing Child Trust Fund (CTF) from a CTF provider into a new Aegon Junior ISA (JISA) on behalf of a child who is under 18 and living in the UK, or on your own behalf if you are the child aged 16 to 18 who has successfully applied to become the registered contact. The Aegon JISA is a Stocks and Shares JISA.

You must have been provided by us with an illustration, Aegon Platform terms and conditions, the supplement for Aegon JISA, Aegon JISA key features, and a Key Investor Information Document (KIID) or a Key Information Document for each investment you're investing in from us before completing this form. If you haven't, we can't process your request. Please contact us on 0345 604 4001 to request an illustration (call charges will vary).

You'll also need to complete an Aegon JISA transfer authority form for each CTF you're transferring. You can download this from our website www.cofunds.aegon.co.uk

Please send the completed form by post to:

Individual Savings Accounts Ltd, 16 High Street, Kegworth, Derbyshire, DE74 2DA

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

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CD version of this document, please call 0345 604 4001 (call charges will vary) or visit aegon.co.uk/support

1. Registered contact and child details

1.1 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
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Permanent residential address

Postcode

Was advice given for this application?

☐ Yes ☐ No

☐ Tick this box to confirm that you've had the opportunity to read the Aegon JISA Key features, Aegon Platform terms and conditions, the supplement for Aegon JISA and fund specific information and/or Key Investor Information Documents (KIIDs) relating to your investment.

1. Registered contact and child details – continued

1.2 Child details

I apply to open an Aegon stocks and shares
JISA for:

Mr / Mrs / Miss / Ms / Other – please specify

Full forename(s)

Surname

Permanent residential address

Postcode

Date of birth

D

D

M

M

Y

Y

Y

Y

Gender

☐ Male

☐ Female

National Insurance number (if held)

☐ The child does not have a National
Insurance number

CTF unique reference number

For tax purposes, is the child resident
anywhere other than the UK?

☐ No

☐ Yes – please download and complete the
Individual self-certification form on our
website and attach to this form. 

2. Transfer in details

In this section, you need to tell us how you'd like to invest into the Aegon JISA.

2.1 What investments would you like to invest in?

Please tick one of the following options:

- ☐ Use my default investment strategy (this only applies if you have already agreed a default investment strategy with us/your adviser).
- ☐ Invest in the investments shown in the table below.

The investments in the table below, should match the illustration you received from us. If the investments don't match, we can't process your request. If you wish to invest in different investments, please contact us for a new illustration.

Full investment manager name, investment name and share class	SEDOL code (this is shown in your KIIDs)	% to be invested
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
		%
Aegon JISA cash facility	n/a	%
Total amount	n/a	100%

If you need to add additional investments, please provide the information on a separate sheet of paper in the format above, sign and date it and attach it to this form. ☒

2.2 Investment strategy

These investment choices can be applied to all future investment choices in this product, please tick this box if you would like to apply your investment choices to all future investments in this product.

- ☐ Use the investment choices above as the new default investment selection.

3. Investment income options

If you have selected income-generating investments in section 2, this section lets you choose how any income distributions paid from those investments will be dealt with when we receive them from the investment provider. We'll apply your selection to all income generating investments held within the Aegon JISA. If you don't make a selection, we'll reinvest any income back into the investment from which it was generated.

Please note we're not able to pay income directly out of the JISA to a customer. Please tick a box below to indicate your choice:

☐ **Reinvest in fund (default)** – reinvest any income received back into the investment from which it was generated.

☐ **Leave in cash** – pay any income into the JISA cash facility.

4. How we treat your personal information

Here at Aegon, we're committed to protecting and respecting your privacy. We collect your personal information so that we can verify your identity, set up your plan and provide ongoing administration. We need this information to carry out our obligations and to provide you with the products and services under the terms of your contract with us. Without it, we wouldn't be able to provide you with a plan.

As part of our administration process, we work with carefully selected service providers (in other words suppliers) that carry out certain functions on our behalf. We only share the appropriate level of personal information necessary to enable our suppliers to carry out their services and they need to keep the information safe and protected at all times. Our suppliers must only act on our instructions and can't use your personal information for their own purposes.

The personal information we collect may be transferred to, and stored at a destination outside the European Economic Area (EEA). This could be to other companies within the Aegon Group or to our service providers. Where any such processing takes place, appropriate controls are in place to make sure your information is protected.

We may disclose your information to licensed credit reference and/or fraud prevention agencies to help make financial or insurance proposals and claims decisions (this will be during the application or enrolment process

and on an ongoing basis), for you and anyone you're linked with financially or other members of your household. Our enquiries or searches may be recorded.

You can find more information on how we use and share your personal information, including how long we keep it and details of your rights at investorportfolioservice.aegon.co.uk/site-info/privacy-and-cookie-policy/ or by contacting us to request a copy.

We'd like to keep you up-to-date with information about our news, products and services. If you'd like to hear more from us, please tick the relevant box below.

☐ Mail

☐ Phone

☐ SMS

☐ Email

By ticking the box(es), you're consenting to receiving marketing messages in this way from us. You can change your mind and unsubscribe at any time simply by contacting us. For more information on how to do this go to investorportfolioservice.aegon.co.uk/site-info/privacy-and-cookie-policy/

We won't pass your information to other companies outside of the Aegon Group for marketing purposes.

5. Declaration

- 5.1 Aegon relies on the information contained in the following documents as they form the basis of the contract for opening an Aegon JISA.
- this application form, including the declarations made in section 6;
 - the contract note for the Aegon JISA; and
 - the Aegon Platform terms and conditions as supplemented and amended by the supplement for Aegon JISA.
- I confirm that:**
- 5.2 I am aware that the Aegon Platform terms and conditions as supplemented and amended by the supplement for Aegon JISA, are the standard terms upon which Aegon intends to rely, and it is important that I read the standard terms before agreeing to be bound by them. If there is any term or point I do not understand in the standard terms or do not wish to be bound by, I understand that I can request further information from Aegon before signing this application.
- 5.3 I confirm that I have had the opportunity to read the Aegon UK Retail Order Execution Policy and I agree to its terms.
- 5.4 I accept that Aegon has not and will not assess the child's suitability for opening an Aegon JISA or any investment decisions I make, and that I will not benefit from the Financial Conduct Authority's rules on assessing suitability except where I have received advice from an adviser. If I have any doubts about the suitability of the Aegon JISA, I should speak to an adviser if I have not already done so.
- 5.5 I accept that any payment into this Aegon JISA, including contributions and transfers, will be placed in the cash facility. Thereafter, investments will be purchased in accordance with the investment instructions given by me.
- I declare that:**
- 5.6 I apply for an Aegon stocks and shares JISA, and services outlined in the application and agree to be bound by the Aegon Platform terms and conditions as supplemented and amended by the Supplement for Aegon JISA.
- 5.7 I apply to make this transfer payment to the Aegon JISA as detailed in section 1.
- 5.8 I am 16 years of age or over.
- 5.9 I am the registered contact for the CTF which is to be transferred as part of this application, as detailed in section 1.
- 5.10 I will be the registered contact for this Aegon JISA.
- 5.11 I have parental responsibility for the child, or I am the child.
- 5.12 The child who will hold the Aegon JISA will not hold a CTF.
- 5.13 The child named in section 1 will be the beneficial owner of the accounts investments.
- 5.14 I have not subscribed, and will not subscribe, to another stocks and shares JISA for this child.
- 5.15 I am not aware that this child has another stocks and shares JISA.
- 5.16 I am not aware of other JISA subscriptions that have or will result in this child exceeding the annual subscription limit.
- 5.17 I will not knowingly make annual subscriptions to JISAs for this child that will result in the annual subscription limit being exceeded.
- 5.18 The child is resident in the UK, or is a UK Crown servant, a dependant of a UK Crown servant or is married to/in a registered civil partnership with a UK Crown servant.
- 5.19 I agree to the Aegon Platform terms and conditions as supplemented and amended by the supplement for Aegon JISA and agree to Aegon UK Retail Order Execution Policy.
- 5.20 The information supplied in the application, and supplementary forms related to it, including transactional data and personal details, is true 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 in the application.
- 5.21 I have read key investor information document(s) relating to the funds I would like to invest in.

5. Declaration – continued

5.22 Where regulations allow, I nominate my appointed adviser to receive correspondence in relation to my investments. This instruction will remain in force unless my appointed adviser has informed Aegon that they wish for this correspondence to be sent directly to me, or I no longer have an appointed adviser to whom Aegon can send these.

I authorise Aegon to:

- 5.23 Hold the child’s cash, subscriptions, JISA, investments, interest, dividends and any other rights or proceeds in respect of those investments and any other cash.
- 5.24 Make on the child’s behalf any claims to relief from tax in respect of any JISA investments.
- 5.25 Disclose details of this Aegon JISA to my appointed adviser.
- 5.26 Pay any fees or charge specified by me to my appointed adviser from the Aegon JISA.
- 5.27 I agree that the amount of the fee or charge reflects the terms of the agreement I have entered into with my appointed adviser. The contract note will confirm the actual amount of the fee or charge to be deducted and paid to my appointed adviser. If I disagree with the fee or charge then I must advise my appointed adviser.

5.28 Arrange the transfer of an existing CTF held by the child with a different provider to this Aegon JISA.

5.29 Obtain details from the child’s existing CTF Manager(s) and authorise the giving of any such details to Aegon.

You should sign and date this form in the signature box below.

When you sign the form you are making the declarations and confirming that you wish to proceed with the instructions in this form.

Date

D	D	M	M	2	0	Y	Y
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Registered contact signature

X

6. Adviser details (for adviser use only)

Adviser name

Firm name

If the adviser would like to take an ad-hoc adviser charge for this transaction, or amend their client’s ongoing adviser charge or service charge, they should do so in relation to the client’s Aegon Platform account.



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