



For customers

# Change of investor details

Once completed, return this form and any additional information to Platform Client Services, Aegon, Edinburgh Park, Edinburgh, EH12 9SE.

Please complete in BLOCK CAPITALS and in ballpoint pen.

## 1. Current details (as currently held by Aegon)

Investor number

If you have a joint plan (only available for Aegon Retirement Choices investors), please provide your joint investor number.

Full forename(s)

Surname

## 2. Change of personal details

You only need to complete fields where your details have changed.

### New name

Title

Full forename(s)

Surname

Enclose a certified copy of the :

Deed poll


Marriage certificate

Decree absolute of divorce

Civil partnership certificate

Other

For information on who can certify a document, go to [aegon.co.uk/certify](http://aegon.co.uk/certify)

Whenever you see this icon , we're asking you to send us additional material with this form.

### New residential address\*

Postcode

### New correspondence address\*

All correspondence will be sent to this address if provided.

Postcode

\*Please send us adviser certified evidence of the change of address.

## 2. Change of personal details – continued

### New contact details

Home phone number

Work phone number

Mobile phone number

Fax

Email

### Change of UK tax residency or UK relevancy status

- Change of UK residency status – enclose the relevant R85 form confirming the changes ☒.
- Change of UK relevancy status – enclose the relevant documentation form confirming the changes ☒.

## 3. Client declaration

To the best of my knowledge and belief, the information I've supplied in this form, is true and complete.

Date (dd/mm/yyyy)

Print name

Signature

If you have a joint plan (only available for Aegon Retirement Choices investors), please provide signatures of all investors.

Date (dd/mm/yyyy)

Print name

Signature (if applicable)

Date (dd/mm/yyyy)

Print name

Signature (if applicable)

Date (dd/mm/yyyy)

Print name

Signature (if applicable)

