



For Aegon Platform customers

Welcome to your Aegon Dashboard (view only)

Our Aegon Dashboard is designed to help you manage your investments, giving you a greater understanding of your finances, lets you see how your investments are performing as well as helping you and your adviser make decisions about what to do next.

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/onlineform

Access your Aegon Dashboard whenever, wherever – it's fully online and available on desktop, mobile or tablet.

Making investing easier

The dashboard is full of helpful information that can support you throughout your investing journey. You can also quickly access online valuations and view and track the performance of your investments.

And it doesn't stop there. By selecting **View & Manage** you'll see a more detailed view of your product, under three tabs – **Overview**, **Transactions** and **Documents**.

AEGON Investments Help and Support Profile Sign out

Ind17607FirstName.Ind26136.LastName
Last signed in - 16:16 BST 05/07/21

Investments

Your total investments
£3,557,984.67
as of 01 August 2021

GIAs	91.79%
Pensions	6.75%
ISAs	1.46%

Your latest status updates | Your investment breakdown

Investment returns are not guaranteed. The value of investments may go down as well as up and you may get back less than you invested.

Stocks and Shares ISA
£51,857.72
[Find out your remaining ISA allowance](#)
Aegon - 80949998

General Investment Account (GIA)
£3,265,952.35
Aegon - 80685012

View & Manage

Overview Transactions Documents

Tax year allowance limit

You can still invest £18,500.00 into your ISA from [this tax year's ISA allowance](#) (starting from 6 April). This is assuming you have no other ISA for this tax year. You can find out more about ISAs in our [Guide to ISAs](#).

Your investments

Fundsmith Equity I Acc	38.12%
VT Chelsea Mgd Aggr Gth A Acc GBP	19.70%
Marlborough UK Micro Cap Gwth P Acc	19.04%
GS India Eq Pfr R GBP	14.36%
Artemis Global Income I Inc	8.78%
Cash	0.00%

Investment valuation as of 09 September 2019

See your transactions as they happen

We've made it easy for you to identify and understand transactions that have happened on your account. You can see a high-level list on your dashboard, but you can also filter the list should you want to look closely at certain transaction types. And, you can download the entire transaction history to Microsoft Excel, making it even quicker to search for the information you need.

Take a look at our [guide to transaction history](#) for more details.

The screenshot displays the Aegon Stocks and Shares ISA dashboard. At the top, the Aegon logo is on the left, and navigation links for 'Investments', 'Help and Support', 'Profile', and 'Sign out' are on the right. The main heading is 'Stocks and Shares ISA'. Below this, the current balance is shown as £51,857.72, with a note 'Including £4.79 available cash' and a date 'As of 02 August 2021'. There are three main action buttons: 'Top up', 'Switch funds', and 'Manage regulars', along with a 'More options' dropdown. A disclaimer states: 'Investment returns are not guaranteed. The value of investments may go down as well as up and you may get back less than you invested.' Below the disclaimer are tabs for 'Overview', 'Transactions' (which is highlighted with a red box), and 'Documents'. The 'Transactions' section shows a summary with 'In' at -£40,015.62 and 'Out' at £0.00. A table lists individual transactions with columns for Date, Transaction, In, and Out.

Date	Transaction	In	Out
12 Aug 2020	Income distribution re-investment	£7.95	
30 Jul 2020	Switch		
15 Jul 2020	Switch		
21 Apr 2020	GIA to ISA	£20,000.00	
10 Feb 2020	Income distribution re-investment	£6.71	
16 Dec 2019	Income distribution	£0.96	
12 Nov 2019	Single contribution	£20,000.00	

All your important documents, altogether

We keep all your important documents relating to your investments on the Aegon Platform in one place on your dashboard. So if you're looking for your last statement or need the details of a specific application, you'll find it under the Documents tab.

The screenshot shows the Aegon platform interface for a Stocks and Shares ISA. At the top, the Aegon logo is on the left, and navigation links for 'Investments', 'Help and Support', 'Profile', and 'Sign out' are on the right. The main heading is 'Stocks and Shares ISA'. Below this, the account balance is displayed as £51,857.72 as of 02 August 2021, with £4.79 available cash. There are three main action buttons: 'Top up', 'Switch funds', and 'Manage regulars', along with a 'More options' dropdown. The account number is Aegon - 80949998 and the intermediary is Donald Adviser 609591. A disclaimer states that investment returns are not guaranteed. Below this are tabs for 'Overview', 'Transactions', and 'Documents', with 'Documents' highlighted in a red box. A message indicates that the user's most recent personal documents are listed below, with a link to 'call us' for older documents. A search bar is provided for the document table. The table lists four documents from 04/06/20: Confirmation of Application (PDF 169.8KB), Application Summary (PDF 62.5KB), Illustration (PDF 133KB), and Key Features Document (PDF 76.5KB), all of type 'Setup'. A 'View more' button and a '25 documents' dropdown are at the bottom of the table.

£51,857.72 As of 02 August 2021
Including £4.79 available cash

Top up | Switch funds | Manage regulars | More options

Aegon - 80949998 | Intermediary: Donald Adviser 609591

Investment returns are not guaranteed. The value of investments may go down as well as up and you may get back less than you invested.

Overview | Transactions | **Documents**

Here are your most recent personal documents. Please [call us](#) if you've any older documents you need to access.

Search table

Date	Document	Type
04/06/20	Confirmation of Application (PDF 169.8KB)	Setup
04/06/20	Application Summary (PDF 62.5KB)	Setup
04/06/20	Illustration (PDF 133KB)	Setup
04/06/20	Key Features Document (PDF 76.5KB)	Setup

View more | 25 documents

Easily update your communication preferences

Use the **Security & Notifications** tab from your **Profile** to select paperless communications and view and change the email address we have registered to your account.

Get started with your Aegon Dashboard

If you and your adviser decide the Aegon Dashboard is right for you, you can request your own activation code at customerdashboard.aegon.co.uk/login

We'll ask you for a few details including your product number and customer number – these are shown on letters we've sent you about your product. But don't worry if you can't find them, your adviser should have a copy.

We'll then send you an activation email and send you an activation code by post. Once you've received both, follow the instructions in your email to complete the activation process – assigning yourself a username, password and security details. From here, you can start to enjoy access to your own Aegon Dashboard.

Although you'll have access to your own investments, your relationship with your adviser will stay the same. It's just that with the Aegon Dashboard, keeping track and managing your investments becomes easier and more straightforward.

Need more help?

If you have any questions you can speak to your adviser or visit aegon.co.uk/support

aegon.co.uk



@aegonuk



Aegon UK



Aegon UK



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