

For customers

Welcome to your dashboard

(view and transact)



Our dashboard is designed to give you an overview of your Aegon Retirement Choices (ARC) account, allowing you to add to and manage your investments. You can see how your investments are performing, helping you and your financial adviser make decisions about what to do next.

EGON

Last logged in: 23 March 2024 18:34

Good morning, Simon David Jones (21045752)

Your dashboard

As at 24 March 2024

Total value
£176,947.09

Since start date 17 March 2022

Return
+£2,200.36
▲ +1.3% [Learn more about returns](#)

The value of your products can fall as well as rise and isn't guaranteed. You may get back less than you pay in.

Kingfisher retirement scheme
Self-invested Personal Pension
£57,687.57 Includes available cash of: £10,000.00
Product number: AW/0012345
[View and manage](#)

Liontrust UK
Self-invested Personal Pension
£57,687.57 Includes available cash of: £10,000.00
Product number: AW/0012345
[View and manage](#)

Individual Savings Account
£23,970.31 Includes available cash of: £10,000.00
Product number: AW/0012345
[View and manage](#)
Advised Invested in model

Online documents

Latest status updates

Product and investment gating

Product reporting

Nomination of beneficiaries

If you and your adviser decide the dashboard is right for you, you can log in at digital.aegon.co.uk/customer/authenticate/login

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio CV version of this document, please call 0345 606 1680 (call charges will vary) or visit aegon.co.uk/onlineform



Access your 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.

The image shows two screenshots of the AEGON dashboard. The top screenshot is the main dashboard for user Simon David Jones, displaying a total value of £176,947.09 and a return of +£2,200.36. It lists three investment products: Kingfisher retirement scheme, Liontrust UK, and an Individual Savings Account. The bottom screenshot is a detailed view of a Self-invested Personal Pension (Product number: SLIS123456), showing a value of £80,054.86 and a return of +£1,106.61. It includes tabs for Investments, Transaction history, Online documents, and Ongoing charges. The Investments tab is active, showing a portfolio of three investments: Cash (50% allocation, £40,027.43), Fidelity European W Acc (25% allocation, £20,013.71), and FTGF ClearBridge US Equity Sustainability Leaders X Acc GBP (25% allocation, £20,013.71).

Good morning, Simon David Jones (21045752)

Your dashboard

As at 24 March 2024

Total value

£176,947.09

Since start date 17 March 2022

Return

+£2,200.36

▲ +1.3% [Learn more about returns](#)

The value of your products can fall as well as rise and isn't guaranteed. You may get back less than you pay in.

Kingfisher retirement scheme

Self-invested Personal Pension

£57,687.57 Includes available cash of: £10,000.00

Product number: AW/0012345

View and manage

Liontrust UK

Self-invested Personal Pension

£57,687.57 Includes available cash of: £10,000.00

Product number: AW/0012345

View and manage

Individual Savings Account

£23,970.31 Includes available cash of: £10,000.00

Product number: AW/0012345

View and manage

Advised Invested in model

Online documents

Latest status updates

Product and investment gating

Product reporting

Nomination of beneficiaries

Dashboard > Self-invested Personal Pension

Product number: SLIS123456 Invested in model

Self-invested Personal Pension

As at 24 March 2024

Value

£80,054.86

Includes available cash of: £39,927.36

Since start date: 17 March 2022

Return

+£1,106.61

▲ +100.00% [Learn more about returns](#)

The value of your investments can fall as well as rise and isn't guaranteed. You may get back less than you pay in.

Top up

Change existing investments

Manage investment strategy

More actions

Investments

Transaction history

Online documents

Ongoing charges

Investments included in model portfolio

Model name: Strategic Passive Yield Mar - V5

You can edit the date at the top of this page to view historical valuations.

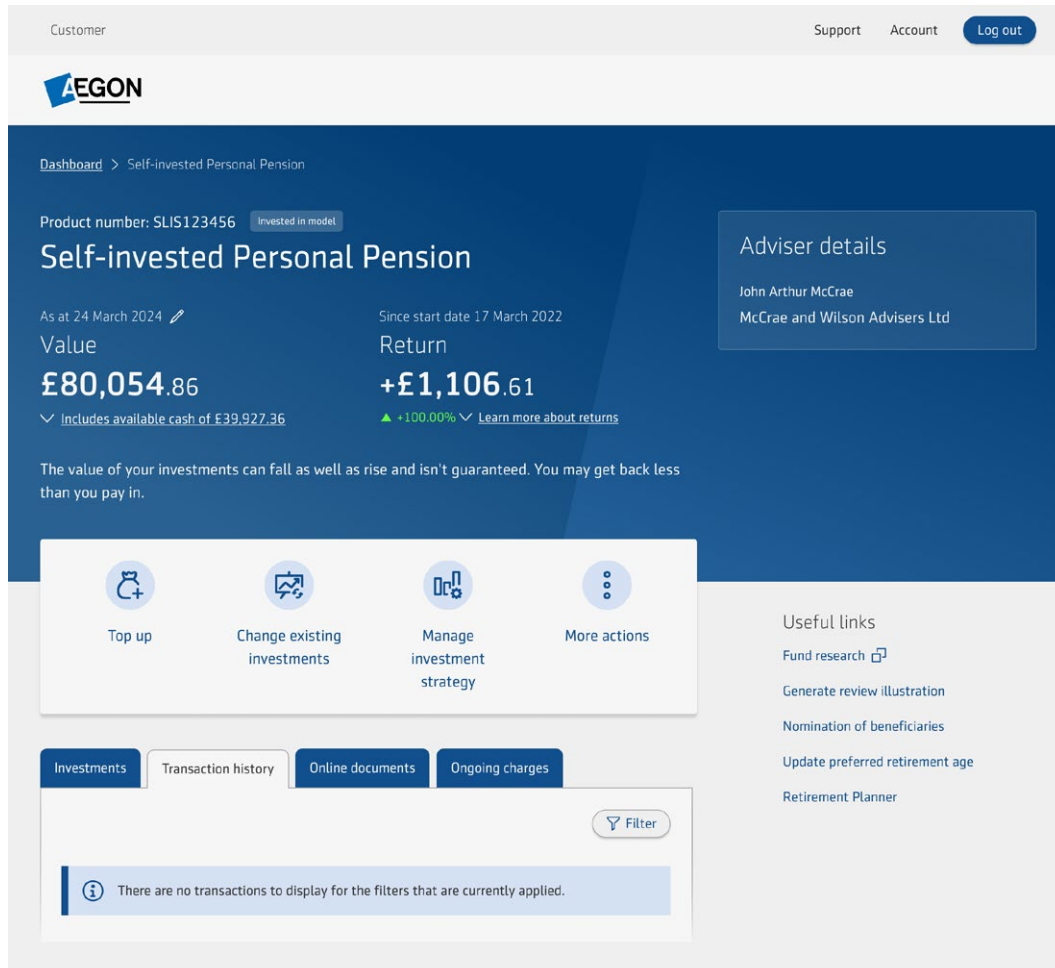
Cash	£40,027.43
Allocation: 50%	
Fidelity European W Acc	£20,013.71
Allocation: 25%	Units: 10,000.00
Strategy: 3.92%	
More info	KID/KIID Factsheet
FTGF ClearBridge US Equity Sustainability Leaders X Acc GBP	£20,013.71
Allocation: 25%	Units: 10,000.00
Strategy: 2.45%	
More info	KID/KIID Factsheet

[Download report](#)

And it doesn't stop there. By selecting **View and manage** you'll see a more detailed view of your product, under four tabs - **Investments**, **Transaction history**, **Online documents** and **Ongoing charges**.

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 if you want to look closely at certain transaction types.



Customer Support Account [Log out](#)

AEGON

Dashboard > Self-invested Personal Pension

Product number: SLIS123456 Invested in model

Self-invested Personal Pension

As at 24 March 2024 [✎](#) Since start date 17 March 2022

Value **£80,054.86** Return **+£1,106.61**

Includes available cash of £39,927.36 ▲ +100.00% ▼ [Learn more about returns](#)

The value of your investments can fall as well as rise and isn't guaranteed. You may get back less than you pay in.

- Top up
- Change existing investments
- Manage investment strategy
- More actions

Useful links

- Fund research [🔗](#)
- Generate review illustration
- Nomination of beneficiaries
- Update preferred retirement age
- Retirement Planner

Investments Transaction history Online documents Ongoing charges [Filter](#)

There are no transactions to display for the filters that are currently applied.



Product reporting

By selecting the Product reporting button on your dashboard, you can see details of your investment performance and valuations, and even choose to download a report.

All your important documents, altogether

We keep all your important documents relating to your investments on ARC 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 with the Online documents button.

The image shows a screenshot of the AEGON dashboard. At the top left is the AEGON logo. The main header area displays the user's name, 'Simon David Jones', and the date '24 March 2024'. It shows the total value of investments as £176,947.09 and a return of +£2,200.36 since the start date of 17 March 2022. A disclaimer states that the value of products can fall as well as rise and isn't guaranteed. Below this are three investment cards: 'Kingfisher retirement scheme Self-invested Personal Pension' (£57,687.57), 'Liontrust UK Self-invested Personal Pension' (£57,687.57), and 'Individual Savings Account' (£23,970.31). Each card has a 'View and manage' button. On the right side, there are four icons: 'Online documents' (highlighted with a pink box), 'Latest status updates', 'Product and investment gating', and 'Product reporting'. Below the dashboard is a detailed view of the 'Online documents' section, which includes a table of documents with columns for Document Date, Product Product number, and Type.

Good morning, Simon David Jones (21045752)

Your dashboard

As at 24 March 2024
Total value
£176,947.09

Since start date 17 March 2022
Return
+£2,200.36
▲ +1.3% [Learn more about returns](#)

The value of your products can fall as well as rise and isn't guaranteed. You may get back less than you pay in.

Kingfisher retirement scheme
Self-invested Personal Pension
£57,687.57 Includes available cash of: £10,000.00
Product number: AW/0012345
[View and manage](#)

Liontrust UK
Self-invested Personal Pension
£57,687.57 Includes available cash of: £10,000.00
Product number: AW/0012345
[View and manage](#)

Individual Savings Account
£23,970.31 Includes available cash of: £10,000.00
[View and manage](#)

Adviser details
John Arthur McCrae
McCrae and Wilson Advisers Ltd

Online documents

Latest status updates

Product and investment gating

Product reporting

Dashboard > Documents

Online documents

All your documents are shown below. Use the filter to select and search for specific documents.

[Filter](#)

Document Date	Product Product number	Type
Account Setup 09/08/2024	General Investment Account 75310967	Key Feature Documents
Investment Confirmation 02/08/2024	Self-invested Personal Pension (drawdown) 72010967	Contract Note Equities
Switch Application Summary 01/10/2024	Self-invested Personal Pension (drawdown) 72081967	Illustration
Annual Statement 05/07/2024	Self-invested Personal Pension 92010967	Illustration
Investment Confirmation 02/08/2024	Self-invested Personal Pension (drawdown) 72010967	Contract Note Equities

Easily view and update your details

Use the **Account** section from the dashboard to select paperless communications and view and change the email address we have registered to your account. You can easily view and update your communication preferences.

It's important to check that the beneficiaries you've nominated on your account are correct. By using the Nomination of beneficiaries button on your dashboard, or going to your Account section, you'll be able to see your beneficiaries, and you can update them if needed.

The screenshot shows the AEGON dashboard for a customer named Simon David Jones. The top navigation bar includes 'Support', 'Account' (highlighted in pink), and 'Log out'. The main header displays the AEGON logo and the user's name. The dashboard is divided into several sections:

- Dashboard Summary:** Shows 'Good morning, Simon David Jones (21045752)'. It includes the date 'As at 24 March 2024', 'Total value £176,947.09', and 'Return +£2,200.36' (with a +1.3% change and a link to 'Learn more about returns'). A disclaimer states: 'The value of your products can fall as well as rise and isn't guaranteed. You may get back less than you pay in.'
- Adviser details:** Lists 'John Arthur McCrae' and 'McCrae and Wilson Advisers Ltd'.
- Product Cards:** Four cards are shown, each with a 'View and manage' button:
 - Kingfisher retirement scheme Self-invested Personal Pension:** Value £57,687.57, includes available cash of £10,000.00, Product number AW/0012345.
 - Liontrust UK Self-invested Personal Pension:** Value £57,687.57, includes available cash of £10,000.00, Product number AW/0012345.
 - Individual Savings Account:** Value £23,970.31, includes available cash of £10,000.00, Product number AW/0012345. A green banner indicates '£10,000.00 available to invest'. Status: Advised, Invested in model.
 - Holiday home savings General Investment Account:** Value £80,000.31, includes available cash of £10,000.00, Product number AW/0012345. Status: Advised, Joint account.
- Navigation Grid:** A grid of icons for 'Online documents', 'Latest status updates', 'Product and investment gating', 'Product reporting', and 'Nomination of beneficiaries' (highlighted in pink).
- Investment Options:** A section titled 'Find out about our investment options' with a 'View investment options' button and a magnifying glass icon.
- Account Actions:** Two buttons at the bottom: 'Add an Individual Savings Account (ISA)' and 'Add a General Investment Account (GIA)', each with a 'Buy' button.
- Footer:** A 'Download report' button.

Transacting through your dashboard

There are several different transactions you can perform yourself, completely online for an individual savings account (ISA) and general investment account (GIA):

- Top up
- Change existing investments
- Manage regular money out
- One-off withdrawal
- Manage investment income (select whether to hold in cash, reinvest or pay as a lump sum)
- Equity trading

Open a new Individual Savings Account (ISA)

In your dashboard, you can select **Buy an ISA**.

To buy an ISA you'll need:

- To confirm your address, bank account and contact details.
- Details of any new bank account you're adding.

The screenshot displays the Egon customer dashboard. At the top, it shows the customer's name, 'Simon David Jones', and the date '21/04/2024'. The dashboard is titled 'Your dashboard' and shows a total value of £176,947.09 and a return of +£2,200.36 (+1.3%). Below this, there are two pension schemes listed: 'Kingfisher retirement scheme Self-invested Personal Pension' and 'Liontrust UK Self-invested Personal Pension', both with a value of £57,687.57. A 'Buy an ISA' button is highlighted with a pink border. The dashboard also includes a 'Download report' button and a section for 'Find out about our investment options'.

Putting you in control

The different products and investments available sit within four levels – we call these gates. Each gate has a different level of access, and as you move up the gates it opens access to more product and investment options. You can sell an investment from any gate but need the correct level of access to buy. You and your adviser can agree on the right gate for you.

Before choosing to open a new gate, you'll be able to see which additional investments and products you'll be able to access.

You'll also need to accept a declaration before actively choosing to move.



You should note that once you move into a new gate, you can't move back.

Below is a summary of the types of products and investments you can access from each gate. As you move up the gates, you'll be able to buy, transact and access products and investments in the earlier gates.

	Gate 1	Gate 2	Gate3 (current gate)	Gate 4 (financial adviser only)
New products you can buy				
General Investment Account, Individual Savings Account (ISA)		✓	✓	✓
Self-invested Personal Pension				✓
General Investment Account (gross), Self-invested Personal Pension (drawdown)				✓
Products you can transact on (that you may have previously bought)				
Self-invested Personal Pension, Self-invested Personal Pension (drawdown)	✓	✓	✓	✓
General Investment Account, Individual Savings Account (ISA)		✓	✓	✓
General Investment Account (gross), General Investment Account (Wealth Management Portfolio)				✓
Investment types available				
Insured funds, lifestyle funds	✓	✓	✓	✓
Open-ended investment companies (OEICs), Société d'Investissement à Capital Variable (SICAVs), unit trusts		✓	✓	✓
Equities			✓	✓
Exchange-traded funds, investment trusts				✓

Activating your account

If you have an email from us with a valid activation code, we'll ask you to set up your online access and create log in details including a password.

Then to add that extra layer of security if we don't already have your mobile number, and you're not already set up for two-factor authentication with us, we'll ask you to set this up. If you're already set up to use two-factor authentication for another account you have with us, you'll simply use the same details.

And then there's only one more step before your account is activated, update your communication preferences. You can select how you want to receive your documents and how you would like to be kept informed of our news, products and services that could be of interest to you or complement the products you already have. Once you've done that, that's you activated and you can log in to your account.

After you've logged in, you can change your preferences at any time by accessing your Account from your dashboard.

If your activation code has expired, please speak to your financial adviser if you have one and they'll send you a new one. If you don't have a financial adviser, or if you have any problems activating your account, contact us and we'll be happy to help.

Not yet registered or activated?

If you've not registered or received an activation email, please contact your financial adviser in the first instance. If you don't have a financial adviser contact us and we'll be happy to help.

Customer ▾ Support

AEGON Search

Aegon UK
Accessing your account online allows you to be in control.
You've got all the information about your products at your finger tips.

Log in

Email address

Password

[Forgotten password?](#)

Log in

Not registered yet?
Would you like to access our platform?
[Find out how to register](#)

Set up online access
If you've been given an activation code you can [set up your online access](#).

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

To log in to your account visit:
digital.aegon.co.uk/customer/authenticate/login



Need more help?



If you have any questions you can speak to your adviser or visit [**aegon.co.uk/support**](https://aegon.co.uk/support)



aegon.co.uk [X @aegonuk](https://twitter.com/aegonuk) [in Aegon UK](https://www.linkedin.com/company/aegon-uk)

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Their Financial Services Register numbers are 165548 and 543123 respectively.

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