

INVESTMENT INSTRUCTION AND SURRENDER FORM

This form should be completed if you currently have a Portfolio Plus Self Invested Personal Pension (SIPP) or Portfolio Plus Pension and you wish to invest in self-invested assets and/or if you wish to move money from insured funds into self-invested assets and vice versa. For the Portfolio Plus Pension you must have already exercised the option to allow self-investment.

Note: If you are looking to invest in a commercial property, please complete the 'Potential Property Investment Details' form.

If you wish to change your insured funds selection only, please complete the 'Switch and Redirection Form for Insured Funds'.

If there is not enough space on this form to list all of your requirements, please use a separate signed sheet of paper and attach it to this form.

1 MEMBER DETAILS

Arrangement number(s)

Aegon product number

Only applicable if you bought your plan through Cofunds.*
*For collective investments.

Your full name

National Insurance number

2 ADVISER DETAILS

Adviser name

Adviser firm

Agency number

FOR AEGON ADVISERS ONLY

Intermediary name

Firm name

Please indicate where the funding for your investment instruction will come from and to which investment it is going into. Please ensure there are sufficient funds in your Member's SIPP bank account to cover any associated transaction charges. See your Terms Sheet for full details.

3.1 Insured Funds

Fund name	Fund code	Percentage of holding to be encashed (%)

Please indicate below how you would like the pension funds derived from the above encashment of units to be split:

Collective investments available from Aegon and/or the product cash facility	Other self-invested assets	Member's SIPP bank account	Total
%	%	%	100%

3.2 Collective Investments available from Aegon and the product cash facility

Fund manager, fund name and share class (where multiple share classes are held)	SEDOL code (this can be found in your Key Investor Information Documents (KIIDs))	Percentage of holding to be encashed (%)

Product cash facility (only applicable if you bought your plan through Cofunds.)

Amount to withdraw £

Please indicate below how you would like the pension funds derived from the above selling of collective investments and/or withdrawal from the product cash facility to be split:

Insured funds	Collective investments available from Aegon and/or the product cash facility	Other self-invested assets	Member's SIPP bank account	Total
%	%	%	%	100%

3.3 Other Self-invested Assets

Self-invested asset	Percentage of holding to be encashed (%)

Please indicate below how you would like the pension funds derived from the above selling of self-invested assets to be split:

Insured funds	Collective investments available from Aegon and/or the product cash facility	Other self-invested assets	Member's SIPP bank account	Total
%	%	%	%	100%

3.4 Member's SIPP Bank Account

Amount to withdraw £

Please indicate below how you would like the pension funds withdrawn from your Member's SIPP bank account split:

Insured funds	Collective investments available from Aegon and/or the product cash facility	Other self-invested assets	Total
%	%	%	100%

INVESTMENT CHOICE

4.1 Collective Investments available from Aegon

For details of the unit trusts and OEICs available from Aegon, please refer to your adviser. Other unit trusts and OEICs can be bought through Stocktrade Limited. Please complete details of these in section 4.2 'Other self-Invested Assets'.

If you took out your plan through Cofunds and have an automated investment instruction set up, please enter '100%' in the product cash facility box below. If you're choosing investments for the first time, you will need to set up a new automated investment instruction strategy below.

Please indicate how you would like the proceeds of your sale instruction(s) to be invested.

Fund manager, fund name and share class (where multiple share classes are held)	SEDOL code (this can be found in your Key Investor Information Documents (KIIDs) ¹)	Percentage invested (%)
Total		100%
Product cash facility (only applicable if you bought your plan through Cofunds.)		%

¹If income units/shares are purchased, and you bought your plan direct from Legal & General, the income will be reinvested in further units in the fund. If you bought your plan through Cofunds the income will be paid into your product cash facility. Alternatively, if you'd like the income reinvested please tick here

Please action the instruction(s) detailed in sections 3 and 4. I can confirm that I have seen the Terms Sheet and understand that separate administration and brokerage charges may apply. Where applicable I have read the Key Features in relation to any investment I am making. Investment of proceeds in accordance with the instruction(s) will take place after any charges have been taken.

In consideration of encashing the value of investments in section 3 in accordance with my instruction(s), I discharge you of all liability in respect of the investment(s) so encashed.

Your
signature

Date of signature

(DD/MM/YYYY)

AEGON CHARGE AUTHORISATION (only applicable if you bought your plan through Cofunds*)

*For collective investments.

Please sign below to confirm that in addition to the declarations before:

I confirm that I have been provided with the Aegon Platform terms and conditions and the supplement for the Legal & General Portfolio Plus Self Invested Personal Pension and Legal & General Portfolio Plus Pension and, by submitting this form, I agree to be bound by them.

I understand that the Aegon Platform terms and conditions and the supplement for the Legal & General Portfolio Plus Self Invested Personal Pension and Legal & General Portfolio Plus Pension set out the standard terms upon which Aegon intends to rely, and it is important that I should read and understand the terms before agreeing to be bound by them. If there is any term or point I do not understand or do not wish to be bound by, I understand that I can request further information before signing this application.

I understand that there is an annual charge for using the Aegon Platform. I authorise Aegon to collect it from my Aegon General Investment Account (GIA).

If there is insufficient money in my Aegon General Investment Account (GIA), I authorise Aegon to sell enough of my Platform Assets, outside my pension, to pay the fee in accordance with Aegon Platform terms and conditions and the supplement for the Legal & General Portfolio Plus Self Invested Personal Pension and Legal & General Portfolio Plus Pension. I also understand that this may result in Commission-included Share Class funds being sold to cover this charge.

I agree to:

- The annual charge
- The sell down option in line with the Aegon Platform terms and conditions and the supplement for the Legal & General Portfolio Plus Self Invested Personal Pension and Legal & General Portfolio Plus Pension

Your
signature

Date of signature

(DD/MM/YYYY)



Please return the completed form to:

SIPP Service Centre
Legal & General
PO Box 5457
Hove
BN52 9GG



legalandgeneral.com

Legal & General (Portfolio Management Services) Limited

Registered in England and Wales No. 02457525

Registered office: One Coleman Street, London EC2R 5AA

Authorised and regulated by the Financial Conduct Authority.

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