

Aegon Platform Election form

For use with Your Future SIPP, Suffolk Life MasterSIPP, SmartSIPP and Suffolk Life SIPP.

This form should be completed if you wish to use the Aegon platform (Cofunds) to deal in investments for SIPPs provided by Curtis Banks Pensions.

Please return the signed original of this form to the Investment Operations team at the above address or via secure message on our online portal.

1 Accessing our services

If you experience difficulties accessing any of our services due to personal circumstances, we may be able to make some adjustments to help you. Please provide us with details of your needs so we can assess any reasonable adjustments that we can make for you.

The information you provide will help us assess your requirements and make any reasonable adjustments to improve how we work and communicate with you.

We will require your consent to process this information, and to enable us to share this data with other third parties where appropriate, e.g. investment firms or advisers, to help us, and others to continue to meet your needs. Please could you kindly provide this below.

I agree to my information being processed by Curtis Banks Group, to include being shared and gathered between relevant third parties.

Please refer to our Privacy Information Notice for Clients, should you require further guidance on how we collect use and protect your personal information. This can be found on our website www.curtisbanks.co.uk or please ask your adviser or us for a copy.

Your consent to share personal information is entirely voluntary and you may withdraw your consent at any time. Should you have any questions about this process, or wish to withdraw your consent, please contact the SIPP Support Team on 01473 296969 or sippsupportteam@curtisbanks.co.uk.

2 Client's details

Client's name

Plan number

3 Client's declaration

By ticking this box you agree to the terms set out in the Aegon Platform Terms and Conditions and the Supplement for SIPPs provided by Curtis Banks (excluding the Cofunds Pension Account). This is available from your adviser.

If you are an existing Aegon Platform customer please give your Aegon Platform customer number:

Signature

Date

For adviser

Adviser firm name

Adviser contact name

Curtis Banks Pensions,
153 Princes Street,
Ipswich, IP1 1QJ
T 0370 414 7000
F 0370 414 8000
curtisbanks.co.uk

Call charges will vary. We may record and monitor calls.

Curtis Banks Pensions is a trading name of Suffolk Life Pensions Limited.

Suffolk Life Pensions Limited is a company registered in England & Wales (registered number 1180742) and is authorised and regulated by the Financial Conduct Authority (number 116298). Suffolk Life Annuities Limited is a company registered in England & Wales (registered number 1011674) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (number 110468). The registered address of both companies is 153 Princes Street, Ipswich, Suffolk IP1 1QJ. SL032.202408 August 2024

