

## INVESTMENT PARTNER

### Aegon

#### About Aegon

We're here to help people achieve a lifetime of financial security – we've been doing that since we started out as Scottish Equitable in 1831. Over the years, we've evolved our brand by combining our proud heritage with Aegon's global strength.

As one of the world's largest financial service organisations, we work with financial professionals, employers and individuals to offer long-term savings, investments, pension solutions and protection products.

#### A platform that goes beyond transacting

At Aegon, we want to help intermediaries build a robust savings journey for every client so that they may, in turn, look forward to a rewarding and secure life during and after work.

To help with this, the Aegon Platform allows you to:

- transact investments quickly;
- research and assess new investment opportunities and tailor portfolios to client needs;
- access a range of tools to give clients a wealth of insight about their current position and performance;
- maintain a complete overview of client investment flows and activity to help inform business strategy and progress against key performance indicators (KPIs); and
- streamline and simplify administration of all of a client's pre- and post-retirement investment planning.

#### A wide investment universe

The Aegon Platform gives you and your clients access to a wide range of investment fund types, asset classes, markets and investment approaches. You can tailor and adapt investment portfolios to each client's age, lifestyle and retirement strategy, including their attitude to risk and income requirements.

In total, the Aegon Platform offers a choice of around 4,400 investment options (as at February 2020).

You can find out more about the different investments available on our [website](#).

#### Tools to support you

A range of online tools is available to select and monitor investments and help determine an appropriate investment strategy for a client. Some of the tools are pre-populated with client data to save time and minimise error. In most cases, you can also use the tools on a standalone basis.

## Expertise by your side

We aim to provide all the help, support and advice you need to integrate the Aegon Platform into your business so you can harness the maximum benefit from it with minimum disruption to your day-to-day operations.

There's a wide range of support available which you can tailor to suit the needs of your business. Our experienced Relationship and Implementation Managers aim to understand the needs of your business and provide the most effective way to support you. Please [contact us](#) to discuss your specific requirements.

## Online support

We provide comprehensive online information to support your business's ongoing use of the Aegon Platform, including user guides, reports, and management information. Visit [our website](#) and select 'Help & Support' to find out more.

## How to contact us

Visit: [cofunds.aegon.co.uk](https://cofunds.aegon.co.uk)

Call: 0345 604 4001

Telephone lines are open Monday to Friday 8.30am to 5.30pm. Calls may be recorded for training and quality purposes. Calls charges will vary.