

GIA - Funding Charges

Use this form to add funds to your GIA for the purpose of funding charges only. If you wish to make an investment, please use a GIA application form.

Please complete this Application Form using black ink and BLOCK CAPITALS and return to: **Financial Discounts Direct, PO Box 85, Alton, Hampshire, GU34 1XS**

1 Personal Details (Primary Account Holder)

Existing Aegon GIA number	8						
Mr/Mrs/Ms/Miss/Other							
Surname							
Full first name(s)							
Email address							
Daytime tel							

Permanent residential address
Postcode

If at current address for less than two years, please supply previous address and time there on a separate piece of paper.

Male ☐ Female ☐ Date of Birth

D	D	/	M	M	/	Y	Y

I confirm that I am solely UK resident for tax purposes and not a US citizen ☐

National Insurance Number

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If you do **NOT** have a National Insurance Number, please tick here ☐

Company Name (if applicable)
Scheme Name (if applicable)
Designation (if applicable)

2 Funding charges

GIA Cash Facility	£
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Please enclose a cheque for your charges made payable to Aegon.

Source of wealth e.g Savings/Salary/Bonus/Inheritance

3 Declaration and Authorisation

Declarations

I/we am/are aged 18 years or over.

I/we declare that the information contained in this application form is correct to the best of my/our knowledge and belief.

Authorisations

I/we authorise Financial Discounts Direct to top up my/our GIA in accordance with my/our written instructions in order to fund charges on my/our account.

I/we authorise Aegon to collect both the Aegon Platform Charge and the FDD Service Charge from my nominated Aegon cash facility.

I/we instruct Aegon to pay Financial Discounts Direct the Service Charge specified in the Charges Schedule, from my relevant Aegon payment account.

If there is less money in my/our cash facility than the exact amount to cover charges, I/we authorise Aegon to sell enough of my platform assets to pay these charges in accordance with the 'Our Charges' section of the Terms and Conditions of the Aegon Platform and the FDD Charges Schedule.

Signature 	Date
Signature 	Date
Signature 	Date

Please note that the details supplied in this form will be used for the purpose of processing your application. We will from time to time send you publications that we believe to be of interest to you, containing popular fund performance - you can opt to be removed from our mailing list at any time.

Financial Discounts Direct is a trading name of Atticus Holdings Ltd, which is authorised and regulated by the Financial Conduct Authority (no. 187674).

GIAFC/11/23

How to contact Customer Services:

FREephone: 08085 498 477 | Email: info@financialdiscounts.com | Web: www.financialdiscounts.com **Post:** PO Box 85, ALTON, GU34 1XS