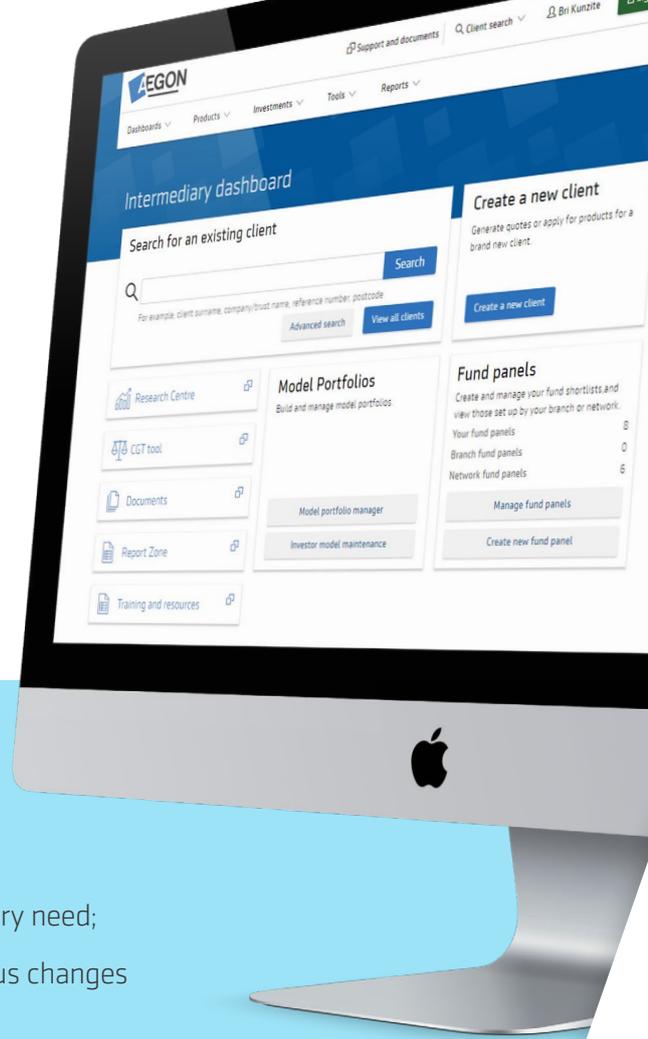


For intermediaries only

10 good reasons to use the Aegon Platform

As the largest platform in the UK¹ we want to go beyond transacting and help you build a robust savings journey for every client throughout their lifetime.



1

Scale and financial strength

With our size and financial strength we can:

- price ourselves competitively;
- adapt our business above and beyond regulatory need;
- navigate our business and yours through various changes that impact our society, and
- provide stability and operational capability to the meet the needs of you and your clients.



2

Ownership

Aegon is an international provider of life insurance, pensions and asset management. Trusted with over EUR 920 billion of assets, we have businesses in over 20 countries around the world.²



3

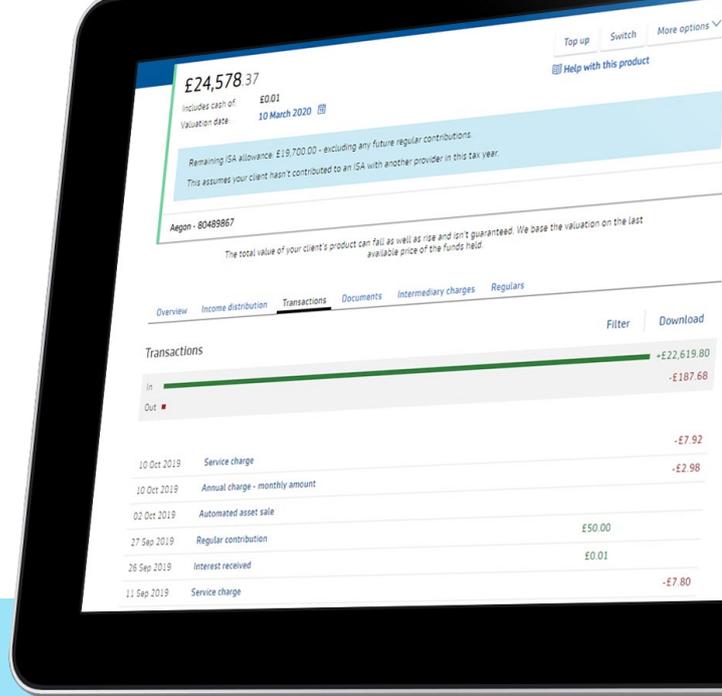
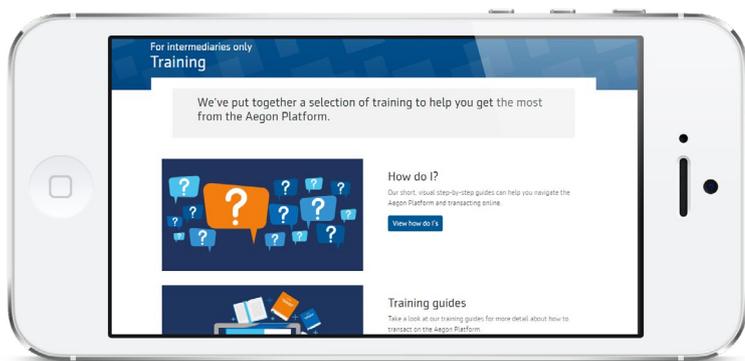
A dedicated intermediated platform

We're totally focused on serving intermediaries like you – not competing with you. Working in partnership, we provide products and services to help you create financial planning solutions to get your clients closer to their financial goals.



¹ Source: Fundscape, October 2020

² Correct as at December 2020



4

Market leading integration

We work closely with leading suppliers of adviser software systems so we can easily integrate the Aegon Platform with your business. And, it means we can share client, product and transaction information with your systems automatically - helping your business run more efficiently.



5

Easy to do business

By simplifying administration and putting you firmly in control, it means you can identify business opportunities to strengthen your sales revenue and reduce your operational overheads. Plus, we don't need a signature for our key online transactions (including new business, withdrawals and trading).



6

Service excellence

We have a comprehensive support team, including:

- Regional Account Managers
- Platform Consultants
- Customer Service
- Tax and Trust Manager
- Pensions Technical
- Regional support

So no matter the nature of the enquiry, or where you are in the country, we have experts on hand for when you and your clients need us.

Although we believe in bringing you regular and direct contact with your Aegon representative, we understand this doesn't work for everyone. That's why we also offer a whole host of [training and resources online](#) from questions and answers to step-by-step guides available to download, save and print so you can easily train your support staff as you go.



7

Centralised control

We've designed six user roles to help you apply tighter governance over specific permissions, and reduce the risk of individuals performing tasks that are outside of their role.

Some of the key functions of these roles mean you can:

- set up your investment proposition as a default;
- access information available to monitor use by other user roles - delivering consistency and reducing risk;
- decide what level of access your clients should have (if any), and
- access a suite of management information so you can reconcile your charge payments.



8

Multi-asset portfolio management

We're committed to providing high quality, value for money solutions that are run and governed by experts. And our six Risk-Managed Portfolios are designed to make investing easier, focused on value and different client risk preferences - suitable for pension, ISA and GIA clients.



9

Ability to give your client's control

Give your clients online access to help them engage with their investments. It provides clients with a view of all the investments they hold with us on the platform and our range of services, giving you more time to help them achieve their financial ambitions.

You can also customise the Customer dashboard to align with your brand.



10

Platform tools

Our core online portfolio planning tools are available to support client servicing:

- Research Centre – browse and compare the funds on offer, see fund charges and objectives and monitor performance.
- Capital gains tax (CGT) tool – gives you the information you need to manage your clients' CGT liabilities.
- Portfolio scan – a product level tool enabling you to see how the investments in your client's portfolios work together. Plus it gives you tailored reporting so you can see the asset mix, performance and holdings.
- Report Zone – benefit from valuable and efficient management reporting that helps you identify opportunities, keep track of business and demonstrate the value of your advice.

