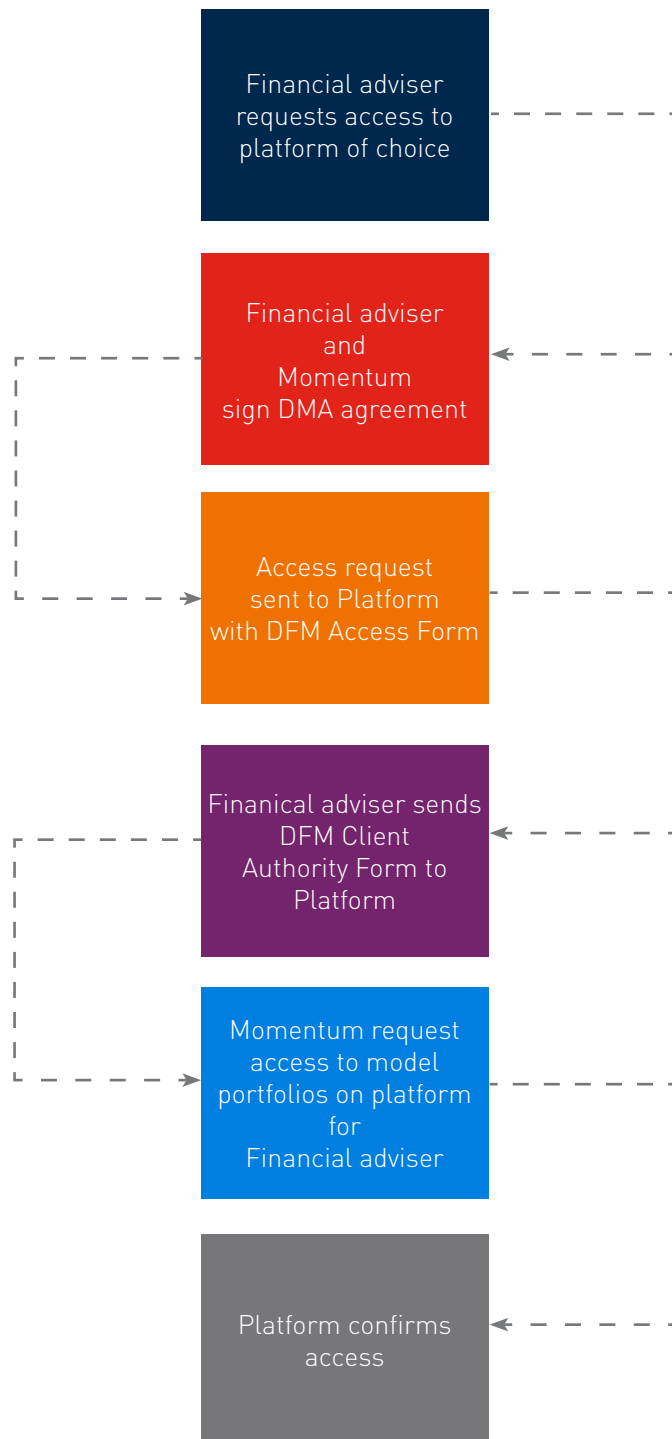


Platform process

The following process is applies to the **Aegon platform**.



The following process applies to the Aegon Platform



Momentum Requirements;

The financial adviser needs to sign the Discretionary Management Agreement (DMA) and return this to Momentum, this can be either;

- a scanned document sent by email to advisersolutions@momentum.co.uk
- a fax sent to +44 (0)20 7480 0730 or
- posted to Momentum, The Rex Building, 62 Queen Street, London, EC4R 1EB

Once the DMA has been received by Momentum, Aegon will be asked to link the financial adviser to the models requested.

Process for new Business;

Financial adviser sends the DMA to Aegon (agrees to Momentum fees, there is no client signature required).

Process for investing into Momentum's Portfolios;

Once the DMA has been received by Aegon investments can be made directly into the portfolios.

Platform Cash Requirement;

Aegon are aware our Portfolios have a cash element, therefore there is no further requirement for cash.

Does Aegon Pre-Fund Switching?

No

Does Aegon Pre-Fund when rebalancing?

No

Does Aegon Pre-Fund income payments?

No
