Valuations - Aegon Platform

Last Modified on 07/08/2023 7:16 pm BST

Information to setup the valuation service with the provider is detailed below.

For further information, please refer to the valuation user guide.

Provider support telephone	03456 044 001 9:00 – 17:00 Monday to Friday
Provider support email	escalationteam@aegon.co.uk
Provider website	https://intermediary.aegon.co.uk/apmfa-home/login
Service Availability	Available 24 hours Monday to Sunday (subject to maintenance)
Access credentials for Pathways	Firm Level Aegon Organisation ID (OUID) + Synaptic Organisation ID
Registration	Aegon have produced a User Guide to help advisers with the setup process on the Aegon Platform. Click on website address above and follow the instructions in Aegon's Guide to Platform Bulk Data. When setting up, select Synaptic from the
	If you have any issues, please send an email to escalationteam@aegon.co.uk requesting to be set up for the Synaptic bulk valuation service with the following information: • Company Name • Company Address • FCA Firm Reference Number
Message type	Individual bulk valuation
Fund codes supported	ISIN MexID
Product types	Platform
Setup guidance	 The contracts should be entered as on platform. SIPP SIPP Drawdown General Investment Account Stocks & Shares ISA Cofunds Pension Account Suffolk Life Annuities Suffolk Life Trustees L&G Portfolio Plus SIPP AJ Bell InvestCentre SIPP