

HOW TO ADD CASH OR MOVE MONEY TO AND FROM A CASH MANAGEMENT ACCOUNT

GETTING STARTED

HELP GUIDE

Use this step by step guide
designed to help you
get started.

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- Select 'Move or withdraw cash' from the 'Manage Investments' menu
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Page 9 - **Moving cash from an ISA, SIPP or Investment Account to your Cash Management Account**

- Select 'Move or withdraw cash' from the 'Manage Investments' menu
- Choose the account you want to move cash from and the amount you wish to move
- Choose your Cash Management Account for the account the cash is to be moved to

BEFORE YOU BEGIN

THINGS YOU WILL NEED

- Your login details
- Debit card details (If you are making a payment by card)



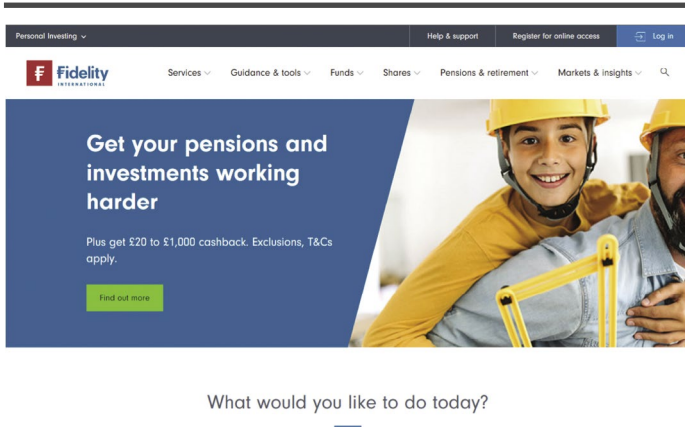
Important information

The images used in this guide are for illustration purposes only and should not be construed as recommendation to buy or sell any investments. When reviewing the performance of your investments, it's also important to remember that past performance is not an indicator of future performance. Fidelity Personal Investing does not give financial advice. If you need advice, please speak to a financial adviser.

GETTING STARTED

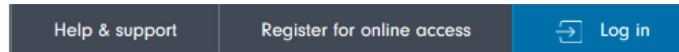


Go to the Fidelity homepage

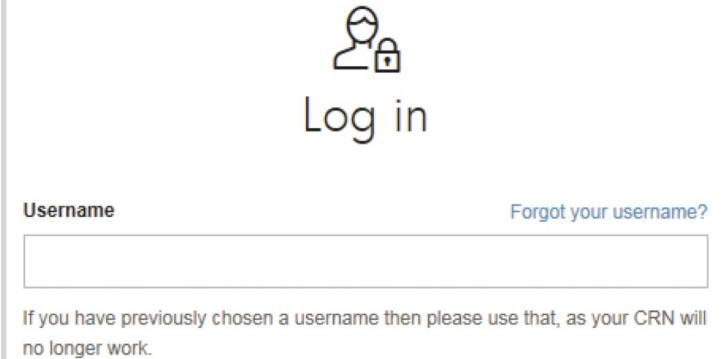


Homepage link: www.fidelity.co.uk

Select **Log in** at the top right corner of the page

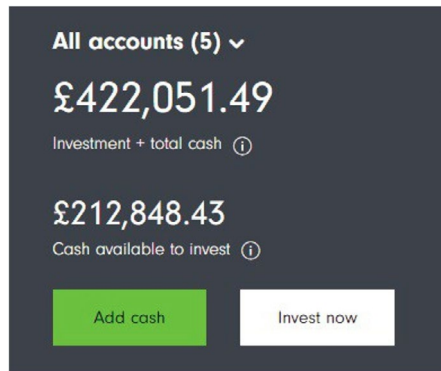


Log in with your username and password



GETTING TO THE ADD CASH PAGE

Select 'Add cash' on your account summary page

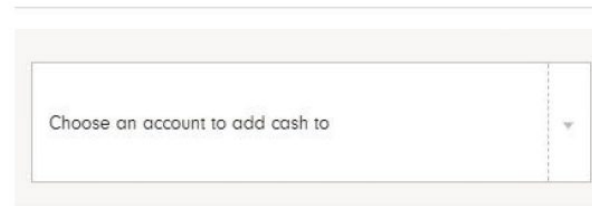


You can also find the 'Add cash' option under the 'Manage Investments' menu at the top of the page.

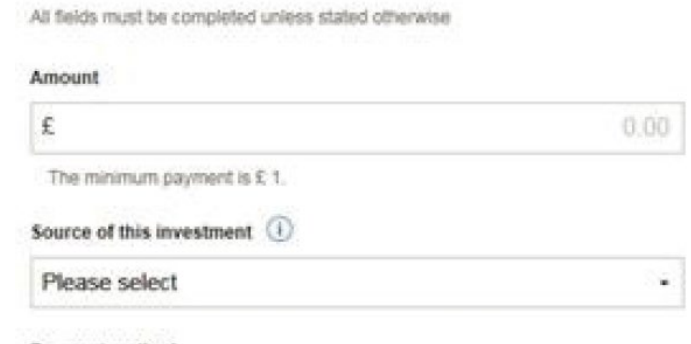


When asked to choose an account to add cash to, select your Cash Management Account from the list

Add Cash



Enter the amount of cash you want to add, and select the source of investment and payment method



Telling us the source of your investment is important as it helps us to fight fraud and keep your money safe.

The next set of details will appear differently depending on which method of payment you are using.

IF YOU'RE MAKING A PAYMENT BY CARD



Enter your details and read and agree to our terms before selecting 'Confirm'

Payment method
Debit card

Whose card is being used for this payment?
 My Card Someone else's

I confirm:
I have read the [Doing Business with Fidelity](#) document and agree to the Client Terms within it.

Next

Cancel

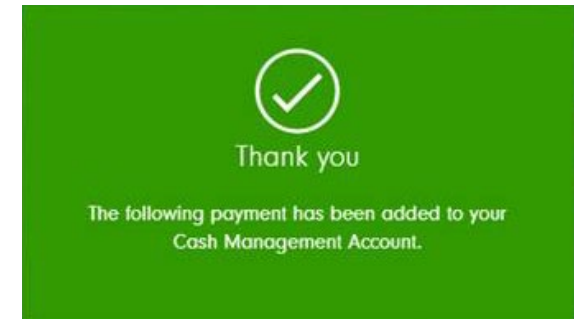
Next, we verify your card details

Additional security

We use the Verified by Visa/MasterCard SecureCode add additional security to your payments and protect against unauthorised transactions. Your transaction is authorised when you enter your Verified by Visa/MasterCard SecureCode password.

You may be asked to provide further information on the 3D Security page as part of your online transaction security. If you are unsure of your details, you may want to check with your card provider before proceeding.

Then we'll confirm your payment



Once your card details and payment are verified, you will receive a confirmation on the screen. You can save a copy of this by selecting 'Print and save'.

IF YOU'RE MAKING A PAYMENT BY CHEQUE



Select **Cheque** and confirm that you have read and agreed to our terms

The minimum payment is £1000.

Source of this investment ⓘ

Please select

Payment method

Cheque

Please review our terms and read each one carefully.

Save the cheque payment slip, print it, and put it in the post

Put it in the post

Fidelity International, Beech Gate, Millfield Lane,
Lower Kingswood, TADWORTH, SURREY, KT20 6RP

Once you have confirmed to our terms and doing business, you will receive an account number and will have the option to save and print the cheque payment slip which you must then send to us.



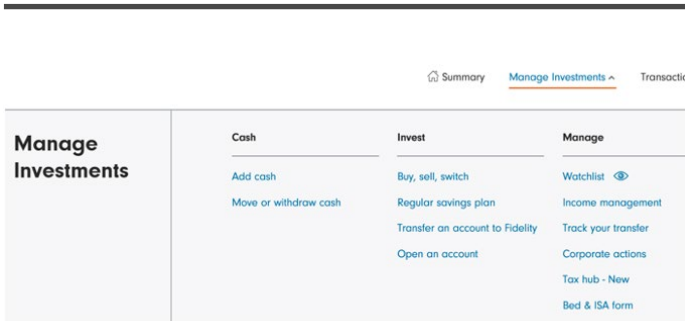
Important information

Please make sure to send us your cheque payment slip along with your cheque so we can complete the process. Once we receive your cheque and your payment has been processed, your money will then be available to invest. Please note that this may take some days for this to appear online.

MOVING CASH FROM YOUR CASH MANAGEMENT ACCOUNT TO AN ISA, SIPP, OR INVESTMENT ACCOUNT

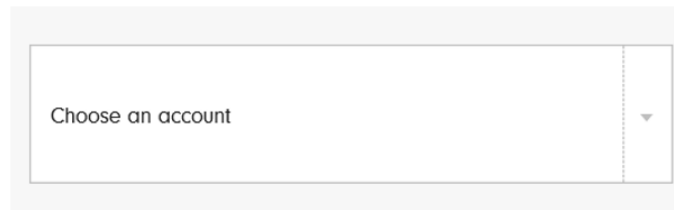


Select 'Move or withdraw cash' from the 'Manage Investments' menu



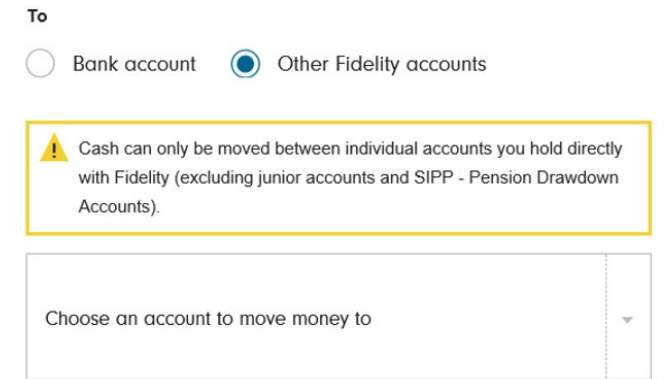
Choose your Cash Management Account and the amount you want to move from it

Move or withdraw cash



Please note that currently you can only move cash which is fully cleared in your Cash Management Account to other accounts.

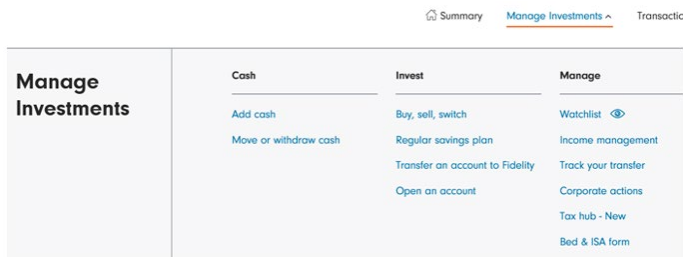
Select 'Other Fidelity accounts' and choose the account you want to move cash to



Once you have selected the account you need to move to, agree to the terms and conditions at the bottom of the page and click next to complete your transaction.

MOVING CASH FROM AN INVESTMENT ACCOUNT TO YOUR CASH MANAGEMENT ACCOUNT

Select 'Move or withdraw cash' from the 'Manage Investments' menu



Choose the account you want to move money from and the amount you want to move

Move or withdraw cash

A screenshot of the 'Move or withdraw cash' form. It features a dropdown menu labeled 'Choose an account' with a downward arrow. Below the dropdown is an 'Amount' input field with a currency symbol (£) on the left and '0.00' on the right.



Select 'Fidelity Cash Management Account'

To

- Bank account
- Fidelity Cash Management Account

! Cash can only be moved between individual accounts you hold directly with Fidelity (excluding junior accounts and SIPP - Pension Drawdown Accounts).

Please note that you can only move cash which is fully settled in your account to Cash Management Account.

Agree to the terms and conditions at the bottom of your screen and click next once ready to complete your transaction.

THANK YOU

We hope you found this guide useful.

If you need help with another journey, you can find our other guides on our website.

