

HOW TO BUY A FUND (OEICS & UNIT TRUSTS)

GETTING STARTED

HELP GUIDE

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

TABLE OF CONTENTS / INDEX

How it works: If you're looking for help on a particular part of this guide, you can find the larger task you are trying to complete below, and then broken down into smaller tasks

Page 3 - **Before you begin**

Page 4 - **Getting started**

- Go to the Fidelity homepage
- Select Log in
- Log in with your username and password

Page 5 - **Getting to the buy page**

- Select Invest Now
- If you have more than one account, select an account
- Select Buy

Page 6 - **Choosing your investments**

- Select Add investments
- Enter the name of your investment
- Add the fund by selecting the name or +

Page 7 - **Choosing your investment amount**

- Select Done once you have added your funds
- If you choose to invest by amount (£)
- If you choose to invest by quantity

Page 8 - **Placing your order**

- Select Buy
- Review your order
- Read and agree to our terms before selecting 'Place Order'

Page 9 - **Confirmation**

- Confirmation of your order

BEFORE YOU BEGIN

THINGS YOU WILL NEED

- Your login details
- Your choice of exchange-traded instrument(s)
- Cash available to invest from your cash account



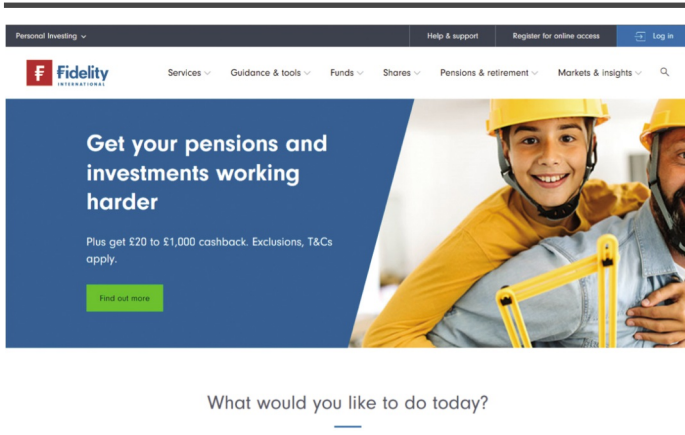
Important information

If you would like to add more money to your cash account, read our guide on how to add cash here. 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



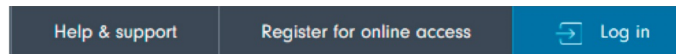
Go to the Fidelity homepage



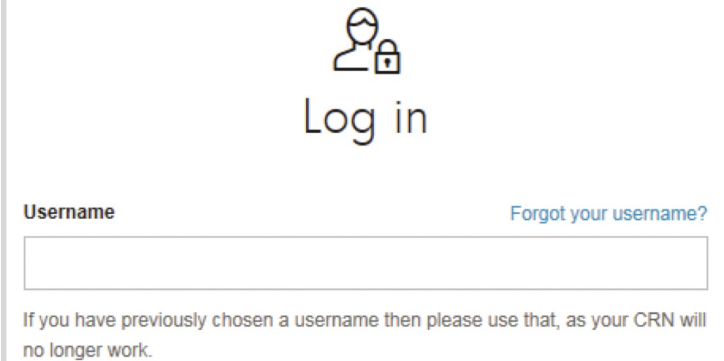
Homepage link: www.fidelity.co.uk



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



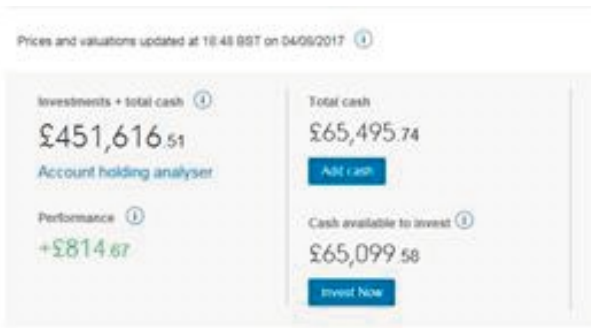
Log in with your username and password



GETTING TO THE BUY PAGE

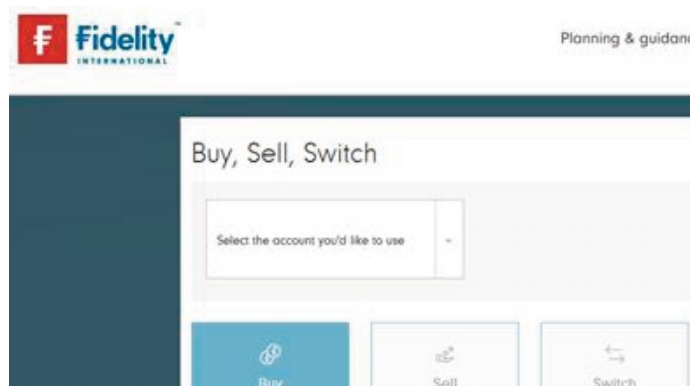


Select Invest Now



You can also access the page through 'My accounts', 'Manage investments' and then 'Buy, sell, switch'.

If you have more than one account, select an account



If you were viewing a particular account before you selected 'Invest Now', the account will be selected on this screen for you. Please make sure this is the account you want to invest in.

Select **Buy**



CHOOSING YOUR INVESTMENTS



Select **Add investments**



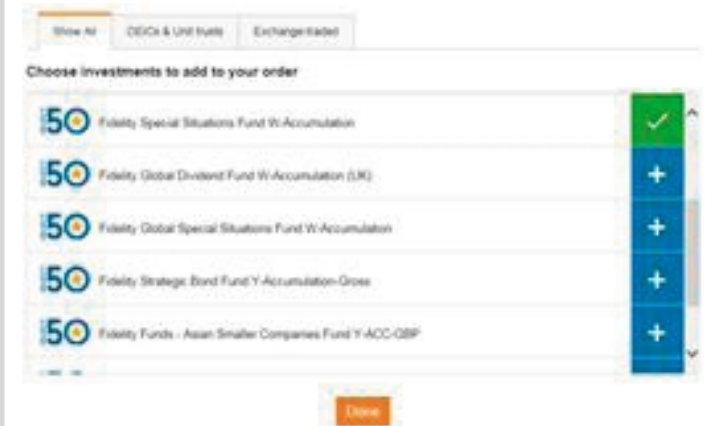
Enter the name of your investment



The search will find all results that contain your text. For example, if you type 'Fidelity', all results containing 'Fidelity' will appear. You can also find a specific fund by searching its fund code, ISIN or SEDOL number.

Your initial searches will show all types of investments by default. Remember to choose 'OEICs & Unit trusts'.

Add the fund by selecting the name or +



A green tick will be displayed next to the fund name to indicate it has been selected for investing.

CHOOSING YOUR INVESTMENT AMOUNT

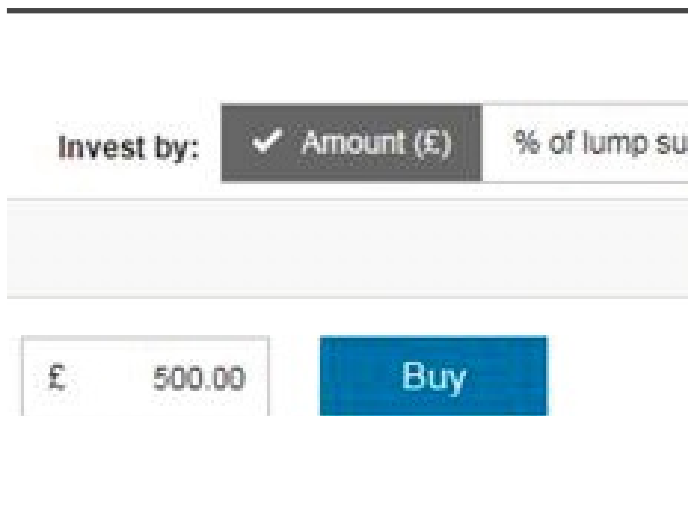
Select **Done** once you have added your funds



You may also select the 'X' in the top right hand corner of this box.



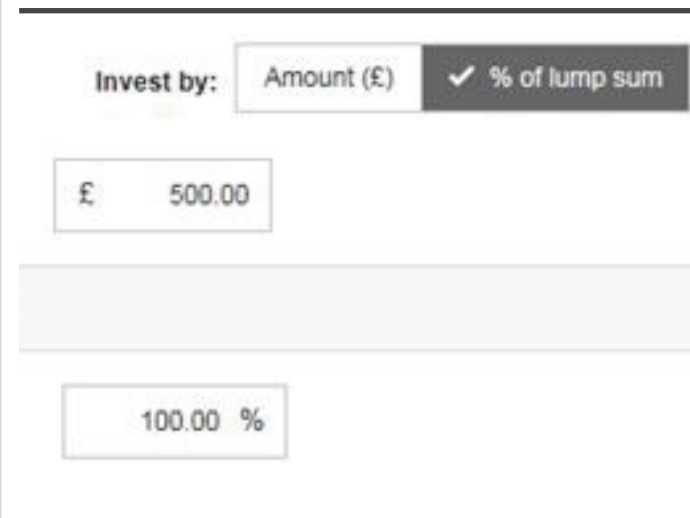
If you choose to invest by amount (£)



Enter the amount you wish to invest.
Alternatively, you can invest by % of lump sum.



If you choose to invest by quantity

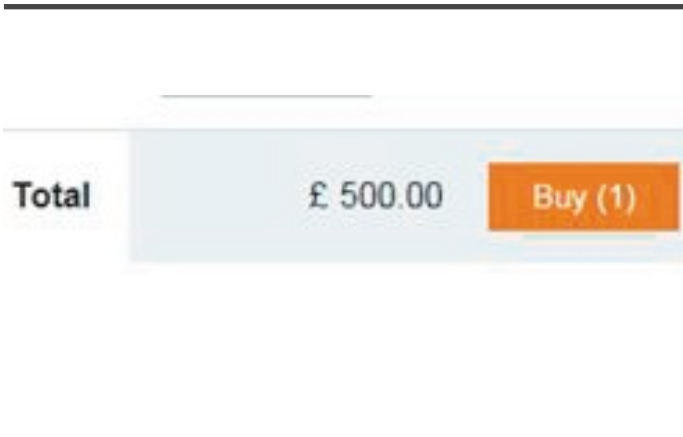


Enter your investment amount then split it easily between investments by typing a percentage for each. This will need to add up to 100%.

PLACING YOUR ORDER



Select **Buy**



Once you are happy with your investment amount, select 'Buy'.

The number in the brackets shows how many funds you have added.

Review your order



You will now see all your details on the next screen. Please review these details carefully.

Read and agree to our terms before selecting **Place Order**



Please make sure that all your details are correct as you will not be able to change them after you place your order.



Important information

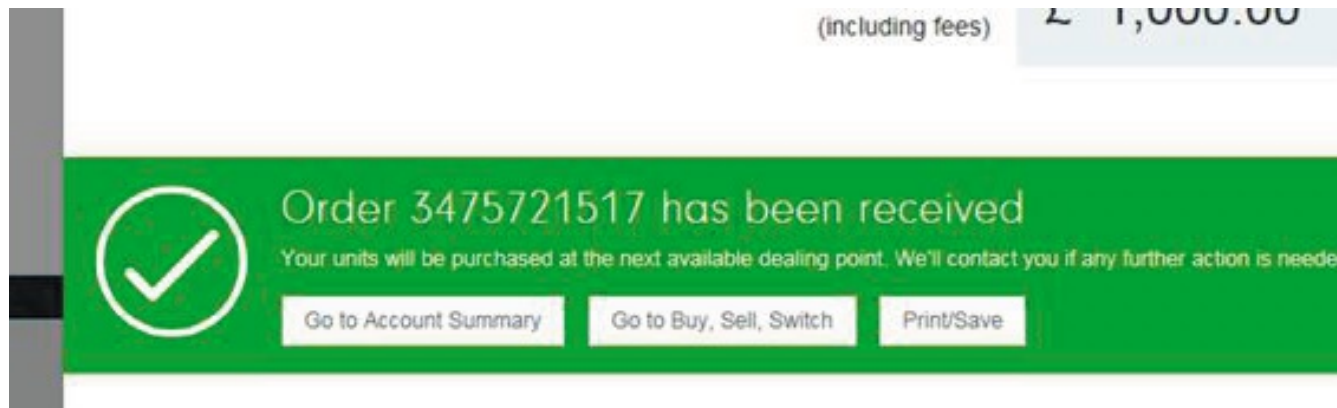
Please read all of the terms and policies listed. Once you are happy with everything, select the box provided to show that you have read and accept these.

CONFIRMATION


Confirmation of your order

You will receive a confirmation of your order and your units will be purchased at the next available dealing point. You can save a copy of your confirmation by selecting 'Print/Save'

From here, you will also get the option to place another order or go to your account summary.



(including fees) 2,1,000.00

 Order 3475721517 has been received

Your units will be purchased at the next available dealing point. We'll contact you if any further action is needed.

[Go to Account Summary](#) [Go to Buy, Sell, Switch](#) [Print/Save](#)

THANK YOU

We hope you found it useful.

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

