

# HOW TO CREATE A REGULAR SAVINGS PLAN

## GETTING STARTED

# HELP GUIDE

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

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**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

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## BEFORE YOU BEGIN

### THINGS YOU WILL NEED

- Your login details
- Your bank details if you haven't yet provided them
- Your choice of investments for the savings plan



#### Important information

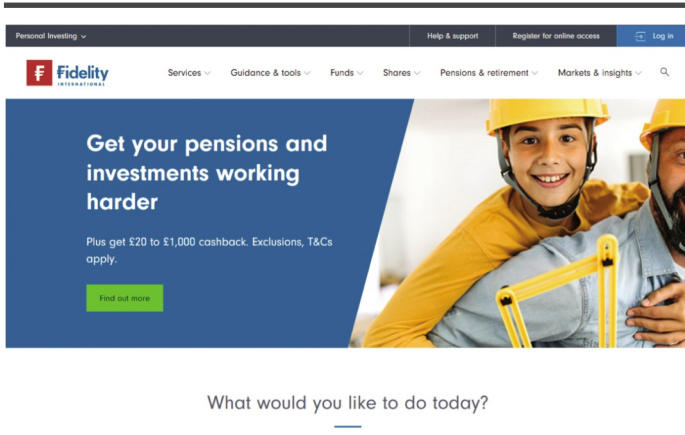
A regular savings plan is effectively a Direct Debit payment plan which will be collected at a time and frequency of your choosing. You can choose to put this money into cash or into investments which you have selected. You can edit your regular savings plan at any time (although any changes may take a few days to show online).

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



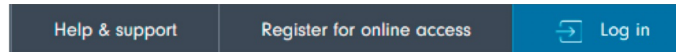
Go to the Fidelity homepage



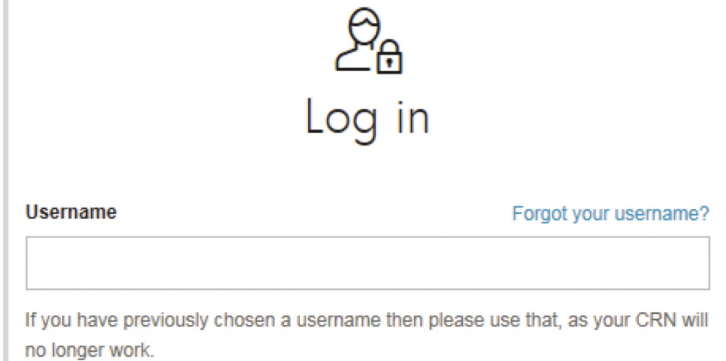
Homepage link: [www.fidelity.co.uk](http://www.fidelity.co.uk)



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



Log in with your username and password



## GETTING TO THE EDIT SAVINGS PLAN PAGE

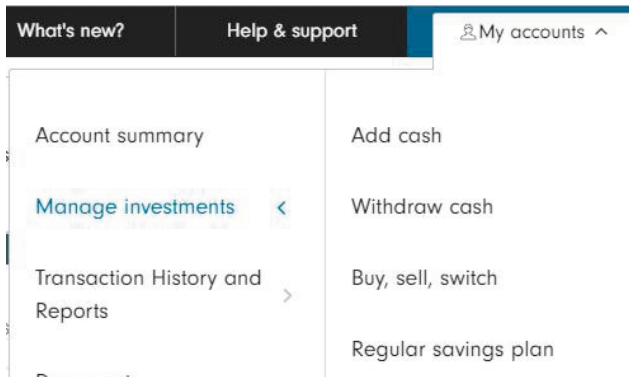
Navigate to the savings plan homepage



Choose the account you want to create a plan for



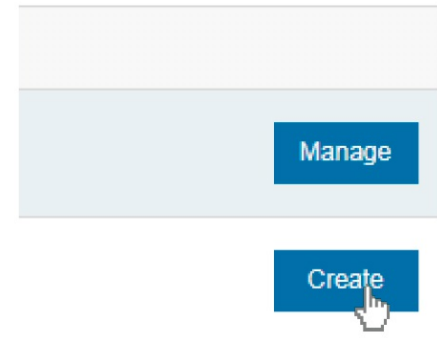
Select **Create**



Regular Savings Plan 19:45 and valuations locked at 09:12:00 on 31/09/2017

Your accounts	Investments • total cash	Amount	Frequency	Next collection date	Manage your plan
Fixedly Personal Investing accounts (2)					
Investment ISA - 4100001817	£32,558.42	£87.00	Monthly	01 October 2017	Manage
Investment Account - janga - janga - AG10001919	£4,563.85	-	-	-	Create
Investment Account - name - name - AG10001728	£4,750.34	£1,540.00	Annually	10 August 2018	Manage
Investment Account - linking - linking - AG10001940	292,886.73	-	-	-	Create
Investment Account - gpf1919 - gpf1919 - AG10001924	£2,200.66	£400.00	Monthly	01 October 2017	Manage
Investment Account - gpf1919 - gpf1919 - AG10001915	£447.35	£463.00	Quarterly	10 November 2017	Manage
Investment Account - mreed5354 - mreed5354 - AG10001920	£5,386.10	£184.00	Monthly	01 October 2017	Manage
Investment Account - f19akbalf19a - f19akbalf19a - AG10001930	£40.80	£151.00	Quarterly	01 November 2017	Manage

Manage your plans



First open the 'My accounts' menu next, go to 'Manage investments' and then 'Regular savings plan'.

## DECIDE HOW MUCH TO CONTRIBUTE AND HOW OFTEN 1 OF 2



Enter a payment amount

Amount £ 0 The minimum p

Frequency Monthly ▾

Collection date 1st of month ▾ ⓘ Est (or

This will be the amount that you pay into your savings plan each time a payment is collected.

Choose a frequency for your payment

Amount £ 0 The minimum p

Frequency Monthly ▾

Collection date 1st of month ▾ ⓘ Est (or

This is how often you will pay into your savings plan.

Choose from monthly, quarterly, every six months or annually.

Choose the day of the month you want it to be collected

Amount £ 0 The minimum p

Frequency Monthly ▾

Collection date 1st of month ▾ ⓘ Est (or

Choose the day of the month that is most convenient for you.

Choose from the 1st, 10th, 17th or 25th of the month.



## DECIDE HOW MUCH TO CONTRIBUTE AND HOW OFTEN 2 OF 2

Select the source of your investment

Source of this investment ⓘ Please select

will be made from this account

Please select a bank ac

Fidelity is committed to fighting fraud and money laundering. Knowing where your investment is coming from is an important part of this. We don't use this information for any other purpose.

Select the bank account you will be paying from

Source of this investment ⓘ Please select

will be made from this account

Please select a bank ac

Payments will be made via Direct Debit from the account you choose here. You can choose to enter new bank details if you wish.

Confirm your Direct Debit details

Confirm Direct Debit details

Please make sure the details below are correct. These are the details we will store on our system to process your Direct Debit. We'll post a confirmation of this to you within three working days.

Any instruction that includes a change to Direct Debit details (e.g. creating a new plan, or amending a bank account) will take 12 working days to be processed. Financial Administration Services Ltd will be the name that appears on the bank statement.

Fidelity International  
PO Box 92  
The Valley, Kilmarnock, East Ayrshire, Scotland, KA11 2YK

Account holder name  
H184

Bank/building society account number  
20807330

Branch sort code  
E2016

Bank/building society name  
NATIONWIDE BUILDING SOCIETY

Service user number  
4 4 6 1 3 8

Reference

Instruction to your bank or building society  
Please see Financial Administration Services Ltd in Fidelity gross company from the account details in this instruction subject to the safeguards issued by the Direct Debit Guarantee. I understand that the instruction may remain with Financial Administration Services Ltd (FAS) until all payment instructions to this bank or building society.

Date  
31/05/2017

Service User Number: ⓘ This is a number that your bank will use to identify Fidelity as the receiving organisation.

Reference field: ⓘ Once you confirm the Direct Debit, we'll add a unique reference for your records in this space. This will ensure accurate tracking.

Next

After you've told us your bank details you'll be asked if you're the only person needed to authorise debits from this account. If so, you will then be shown your Direct Debit details to check and confirm. If not, you'll need to complete a Direct Debit form later in the process.

## DECIDE WHERE TO INVEST YOUR CONTRIBUTIONS



Choose investments by searching or adding your existing investments



Your chosen investments will then appear in the grid in the middle of the screen.

Your contribution to the savings plan will be saved as cash until you choose how to invest it.

Choose what percentage of your savings you want to go into each investment

Cost per trade	% of contribution
N/A	50.00 %

Enter a percentage for each investment using the ‘% of contribution’ field. You can see how much money this will be in the ‘Approx. amount (£)’ field. The minimum you can pay into any investment at a time is £25.

When you’re happy with where your contributions are being paid, select ‘Confirm’.

Read our terms and then confirm you accept them

**Fees illustration**

This illustration shows you the predicted Fidelity fees pay over time on the investment(s) you are buying.

[View illustration](#)

I confirm that:

- I have read the [key information document](#) for this order.
- I have read and agree to the [Doing Business with Fidelity](#)
- I have read the illustrations.

[Place Order](#)

You will then be shown the relevant terms and conditions for your order.

### Important information

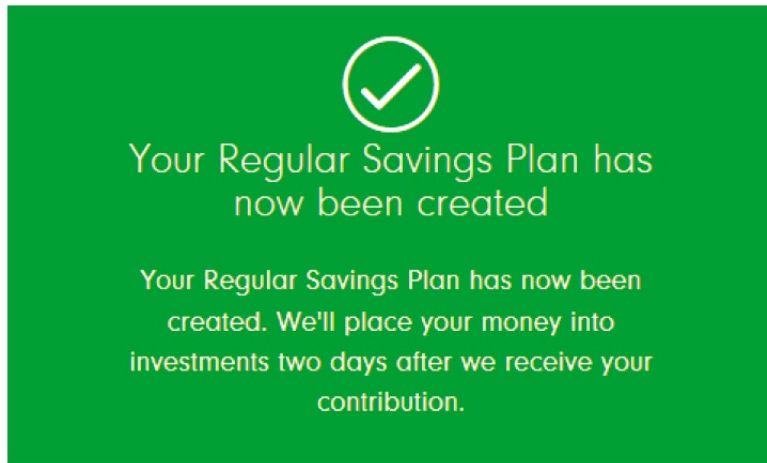
Please read all of the terms and policies listed. Once you are happy with everything, select the box provided to show that you have read and accept these.



## CONFIRMATION OF YOUR PLAN



If you are the only person needed to authorise the Direct Debit



If you see the confirmation screen shown above your savings plan has now been created. We'll place the money into your selected investments two days after we receive the payment.

If you need someone else's authorisation for the Direct Debit



If you see the above you will need to follow the instructions shown on screen to complete the setup of your plan. This means printing and completing the Direct Debit form provided before sending it to us. A confirmation will be provided to you once we have processed your request.

# THANK YOU

We hope you found it useful.

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

