

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

Page 5 - **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

Page 6 - **Editing your plan**

- Enter a payment amount
- Choose a frequency for your payment
- Choose the day of the month you want it to be collected

Page 7 - **Saving and confirming your changes**

- Select the source of your investment
- Select the bank account you will be paying from
- Confirm your Direct Debit details

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- If you are the only person needed to authorise the Direct Debit
- If you need someone else's authorisation for the Direct Debit

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

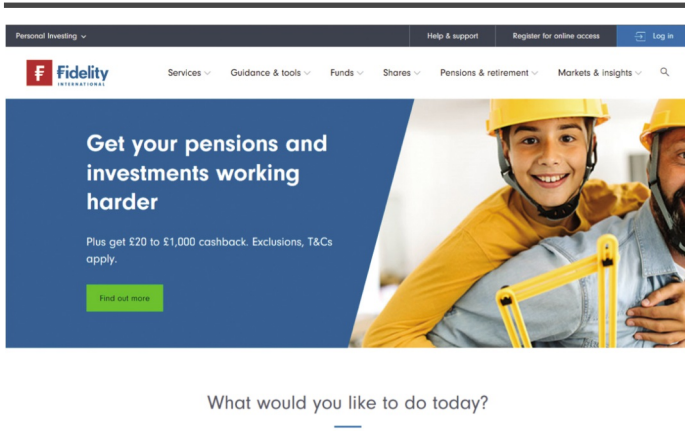
A regular savings plan is effectively a Direct Debit payment plan which will be collected at a time and frequency of your choosing. You can choose to put this money into cash or into investments which you have selected. You can edit these details at any time (although any changes may take a few days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

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

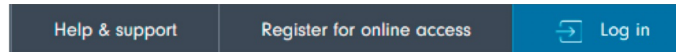


Go to the Fidelity homepage

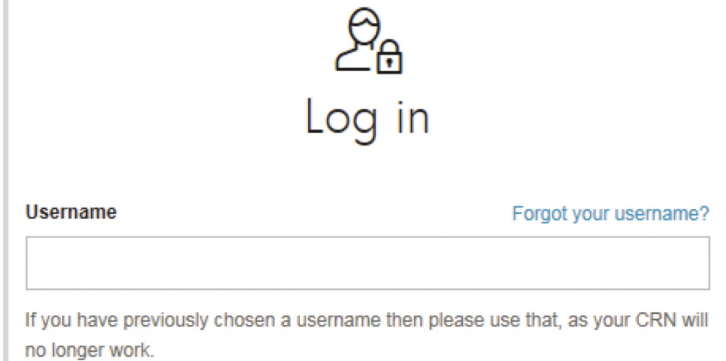


Homepage link: www.fidelity.co.uk

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

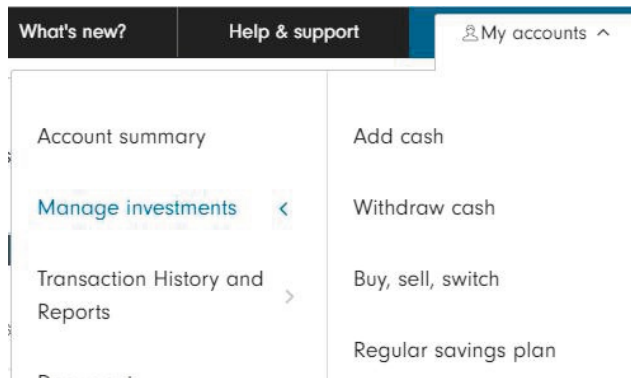


Log in with your username and password



GETTING TO THE EDIT SAVINGS PLAN PAGE

Navigate to the savings plan homepage



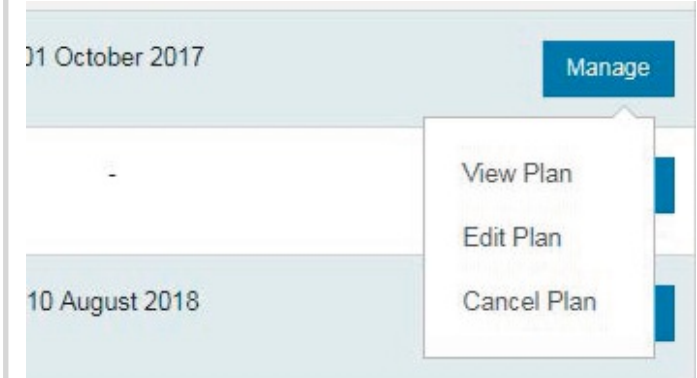
Find the plan you want to edit

The screenshot shows a table titled 'Regular Savings Plan' with the following columns: 'Your accounts', 'Investments + total cash', 'Amount', 'Frequency', 'Next collection date', and 'Manage your plan'. The first row is highlighted, and the 'Manage' button is visible.

Your accounts	Investments + total cash	Amount	Frequency	Next collection date	Manage your plan
Priority Personal Investing accounts (2)					
Investment ISA - 480003847	£31,558.42	£87.00	Monthly	01 October 2017	Manage
Investment Account - jango - jango - AG1000195	£4,563.85	-	-	-	Close
Investment Account - name - name - AG1000728	£4,750.34	£1,543.00	Annually	10 August 2018	Status
Investment Account - linking - linking - AG1000180	291,886.73	-	-	-	Close
Investment Account - gprfgrt - gprfgrt - AG1000924	£2,200.66	£400.00	Monthly	01 October 2017	Status
Investment Account - gfrfgrt - gfrfgrt - AG1000995	£447.35	£463.00	Quarterly	10 November 2017	Status
Investment Account - mreed554 - mreed554 - AG1000920	£5,386.10	£184.00	Monthly	01 October 2017	Manage
Investment Account - ftkabuffsa - ftkabuffsa - AG1000930	£40.80	£151.00	Quarterly	01 November 2017	Status



Select **Manage** and then **Edit**



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

EDITING YOUR PLAN



Your current contribution details are at the top of the page

Your current investment details are at the bottom

You can now edit both sets of details as desired

Contribution details

Amount	£	67
Frequency	Monthly	
Collection date	1st of month	
Next collection	October 2017	

% of contribution	Approx. amount (£)
100.00 %	£67.00

Edit Regular Savings Plan

Account you selected: Investment ISA (Investment) £25,024.85

Your ISA allowance: £13,478.00 used, £1,502.00 remaining

Contribution details

Amount: £ 67 (The maximum allowed is £13,478.00)

Frequency: Monthly

Collection date: 1st of month

Next collection: October 2017 (Contribution collection date: 01 October 2017 (or the next working day))

Contributions will be made from this account: ukba (UKBA)

Investment details

Investment name	Cost per trade	% of contribution	Approx. amount (£)
Cash		100.00 %	£67.00

SAVING AND CONFIRMING YOUR CHANGES

Select **Save changes**

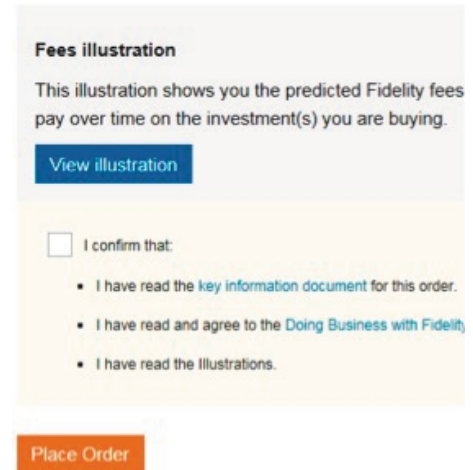


Confirm your Direct Debit details



You'll now be shown your Direct Debit details to check and confirm these have not changed. If you need the authorisation of another party, you'll need to complete a Direct Debit form later in the process.

Read our terms and then confirm that you accept them



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

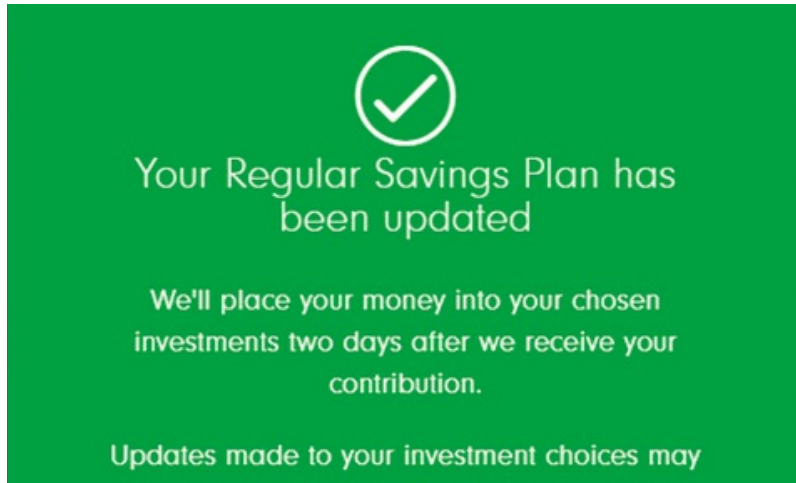
i Important information

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.

OUR CONFIRMATION OF YOUR CHANGES

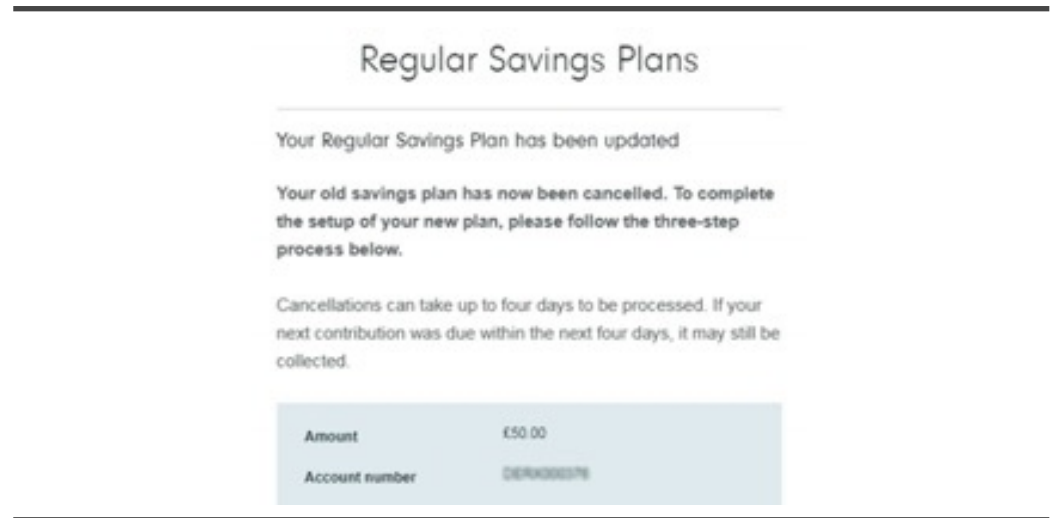


If you are the only person needed to authorise the Direct Debit



If you see the confirmation screen shown above your savings plan has now been updated. 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 update 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.

