

HOW TO SELL A FUND (OEICS & UNIT TRUSTS)

GETTING STARTED

HELP GUIDE

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

How to sell a fund (OEICs & Unit trusts)

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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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Page 2 - **Getting started**

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

Page 3 - **Getting to the sell page**

- Go to My accounts > Manage investments > Buy, sell, switch
- If you have more than one account, select an account
- Select Sell

Page 4 - **Placing your order**

- If you choose to sell by amount (£)
- If you choose to sell by quantity
- Select Sell

Page 5 - **Review and confirmation**

- Review your details and choose where you'd like the money to be paid
- Confirmation of your order

BEFORE YOU BEGIN

THINGS YOU WILL NEED

- Your login details
- Your choice of investment(s) to sell



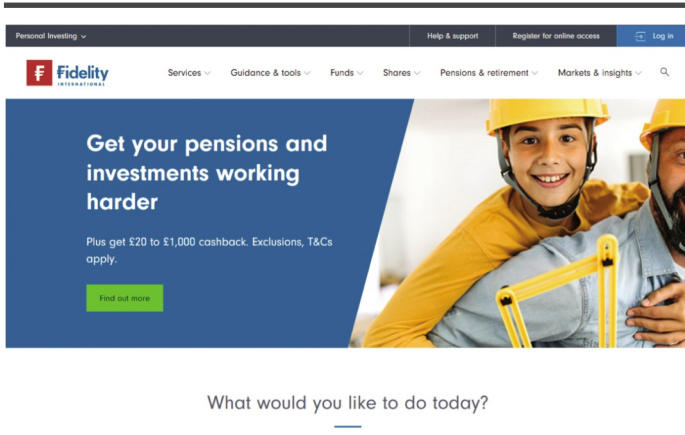
Important information

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



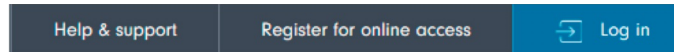
Go to the Fidelity homepage



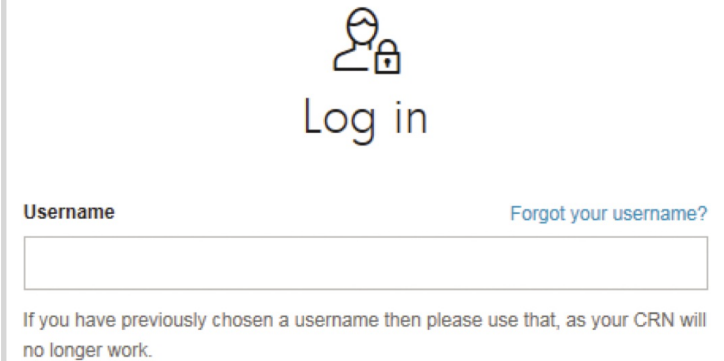
Homepage link: www.fidelity.co.uk



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

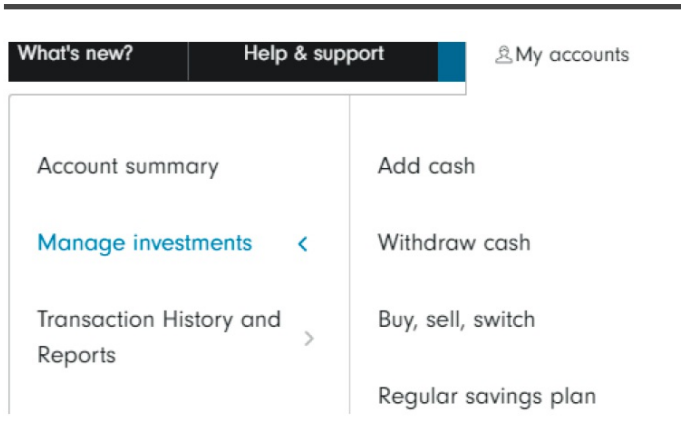


Log in with your username and password



GETTING TO THE SELL PAGE

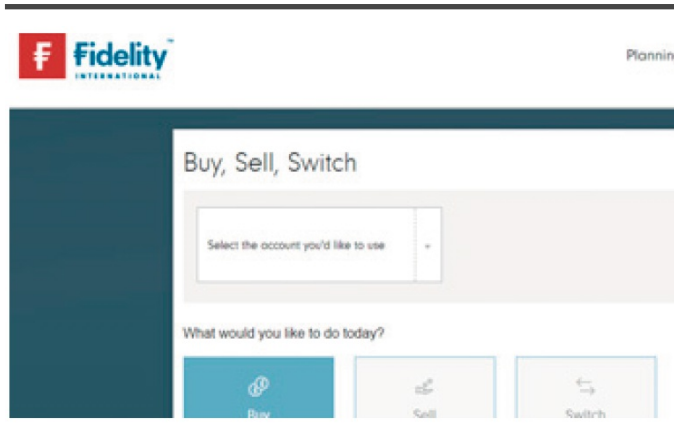
Go to **My accounts** >
Manage investments >
Buy, sell, switch



You can also access the sell page through the 'Deal' button and selecting sell.



If you have more than one account, select an account



If you were viewing a particular account before coming to this screen, the account will be selected on this screen for you. Please make sure this is the account you want to deal on.



Select **Sell**



PLACING YOUR ORDER



If you choose to sell by amount (£)

Tradable value <small>i</small>	Sell by:	Amount (£)	Quantity
£9.18	<input checked="" type="checkbox"/> Amount (£)	£ 0.00	<input type="button" value="Sell"/>
£50.04	<input type="checkbox"/> Quantity	£ 30.00	<input type="button" value="Sell"/>

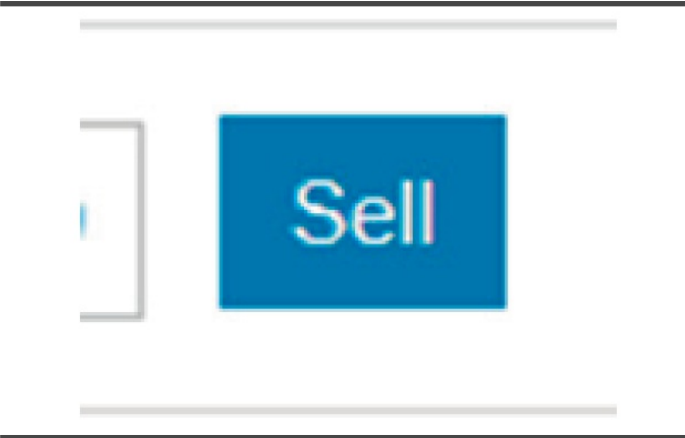
You will be given the option to sell from your existing investments. Please note the tradable value for each investment. You can enter a partial amount to sell from the investment, 'Sell all', or sell by unit quantity.

If you choose to sell by quantity

Tradable value <small>i</small>	Sell by:	Amount (£)	Quantity
£9.18	<input type="checkbox"/> Amount (£)	0.00	<input checked="" type="button" value="Sell"/>
£50.04	<input checked="" type="checkbox"/> Quantity	1.00	<input type="button" value="Sell"/>

Please note the tradable quantity for each investment.

Select **Sell**



REVIEW AND CONFIRMATION



Review your details and choose where you'd like the money to be paid

Choose where you'd like cash from this sale to be paid:

Mr J Smith
401234 ****4321

Investment name	Latest sell price	Sell by:	Quantity
Baillie Gifford Japanese Fund B Acc	1,643.00p	<input checked="" type="checkbox"/> Amount (€)	€ 10.00

Tradeable value: € 16.51 or [Sell all](#)

Estimated total € 10.00

[Place Order](#)


You will now see all your details. Please review these details carefully and make sure they are correct as you will not be able to change them after you place your order.



Important information

Proceeds from a sale can be paid into your Fidelity account, or can be sent directly to your bank account. If you choose to have proceeds paid into your cash account, you can withdraw this money to your bank account once it has settled, or leave it in your account for use at a later point.

Confirmation of your order

 **Order 5608703717 has been received**
Your units will be sold at the next available dealing point. We'll contact you if any further action is required.

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

You will receive confirmation of your order and your units will be sold 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.

THANK YOU

We hope you found it useful.

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

