

# HOW TO SWITCH AN INVESTMENT

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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 choice of investments to switch from and into



### Important information

A switch is where you sell from one OEIC or unit trust (switch out) and reinvest straight into one or more others (switch in).

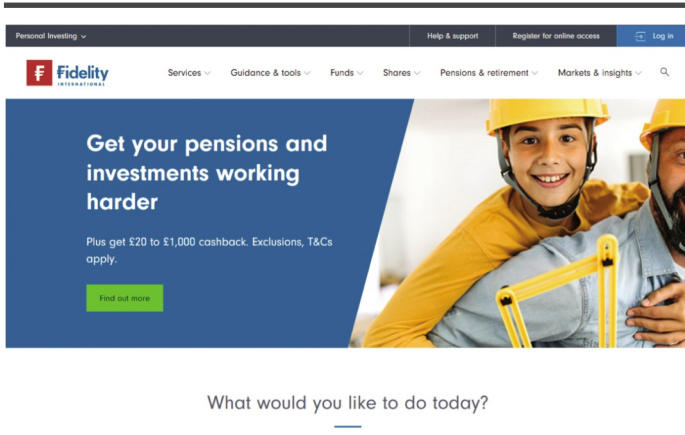
This is not available for exchange-traded instruments, to do so you will need to place separate orders using 'Buy' and 'Sell'.

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



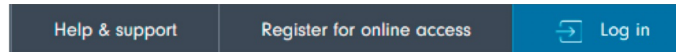
Go to the Fidelity homepage



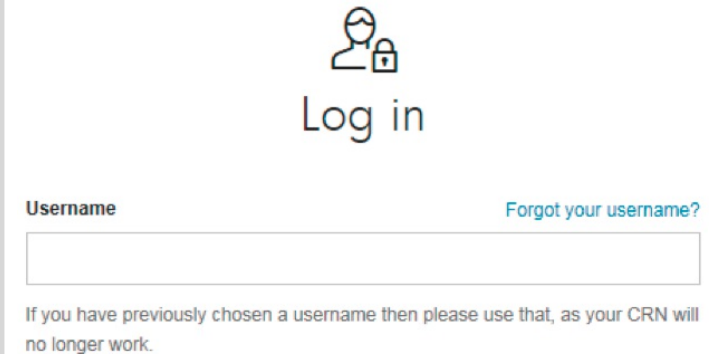
Homepage link: [www.fidelity.co.uk](http://www.fidelity.co.uk)



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



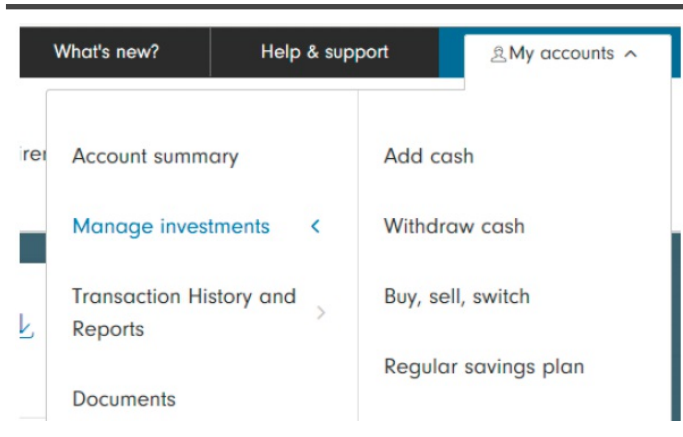
Log in with your username and password



## GETTING TO THE SWITCH PAGE



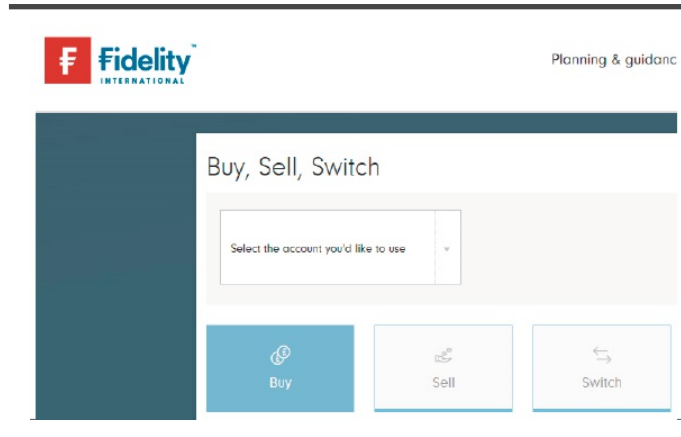
Go to **My accounts > Manage investments > Buy, sell, switch**



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

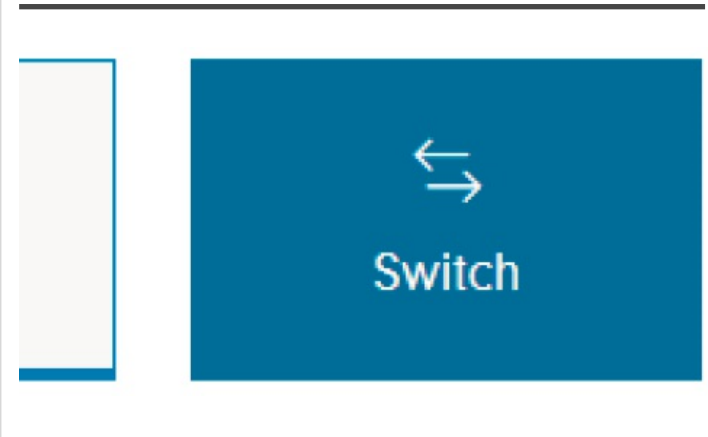


If you have more than one account, select an account



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 **Switch**



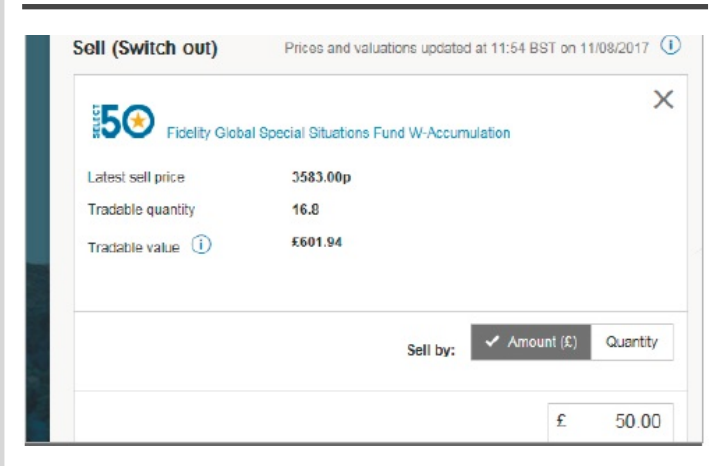
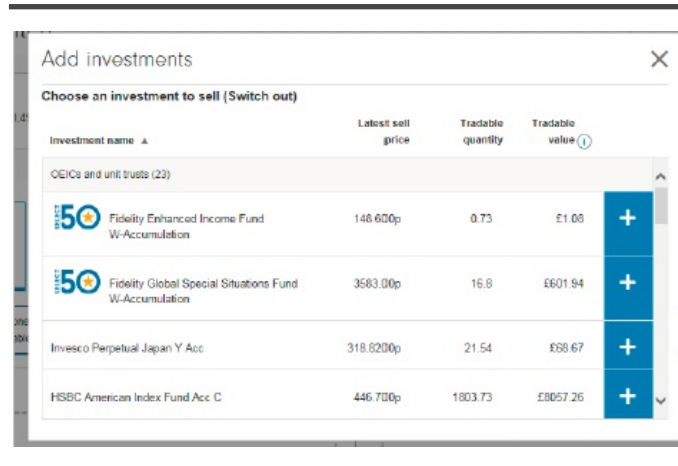
## CHOOSING THE INVESTMENT TO SELL



Select **Add an investment to sell**

Select the investment name or +

Choose to sell by amount (£) or quantity



Enter the amount you'd like to sell. You can see how much you have available under 'Tradable value'. You can also choose to sell by quantity and see how much is available under 'Tradable quantity'.

## CHOOSING THE INVESTMENT TO BUY 1 OF 2

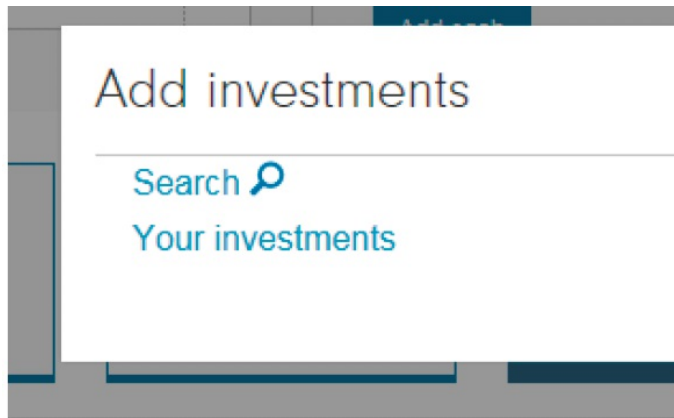


Select **Add an investment to buy**

Buy (Switch in)

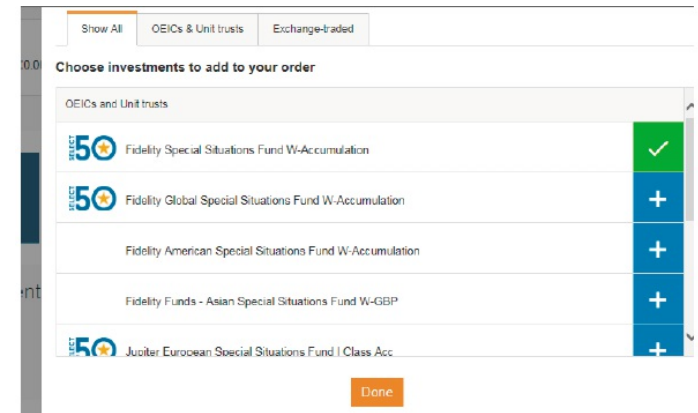


Choose **Search** for new investments or **Your investments** for existing ones



You can search for new investments or pick your current ones.

Add the investment 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 THE INVESTMENT TO BUY 2 OF 2



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

Investment Selection



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

Decide how much of each investment to buy

Investment Selection updated at 18:48 BST on 09/08/2017

Investment Selection W-Accumulation



Percentage of sale

0.00 %

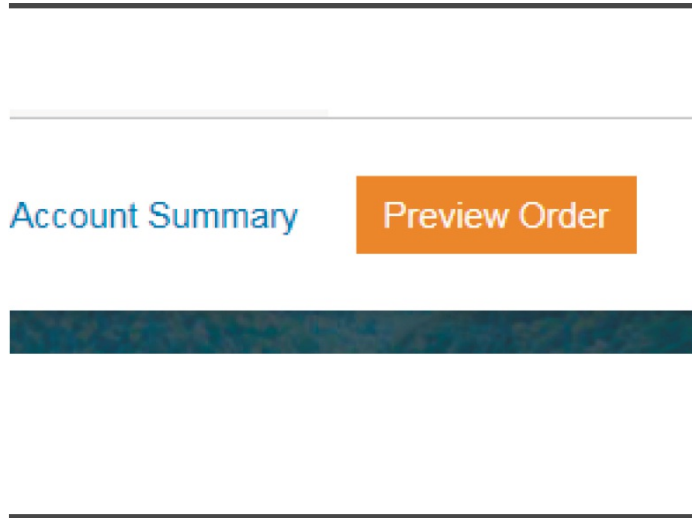
You'll need to decide the split between your chosen investments where the total will need to add up to 100%.



## PLACING YOUR SWITCH

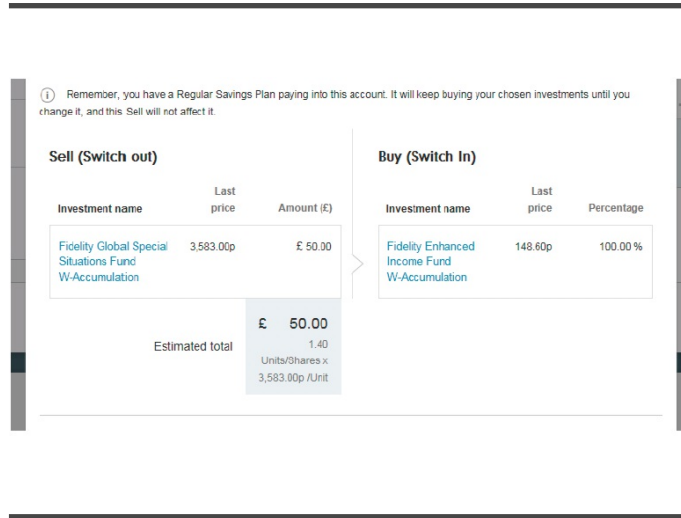


### Select **Preview Order**



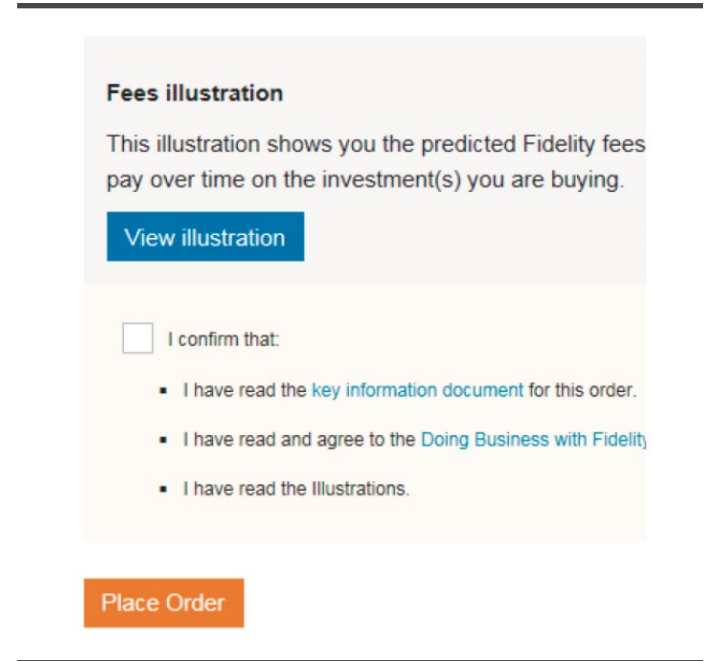
Once you are happy with your selections, select 'Preview Order'.

### Review your order



You will now see all the details of your switch deal(s) on the next screen. Please make sure these are correct as you will not be able to change them after you place your order.

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

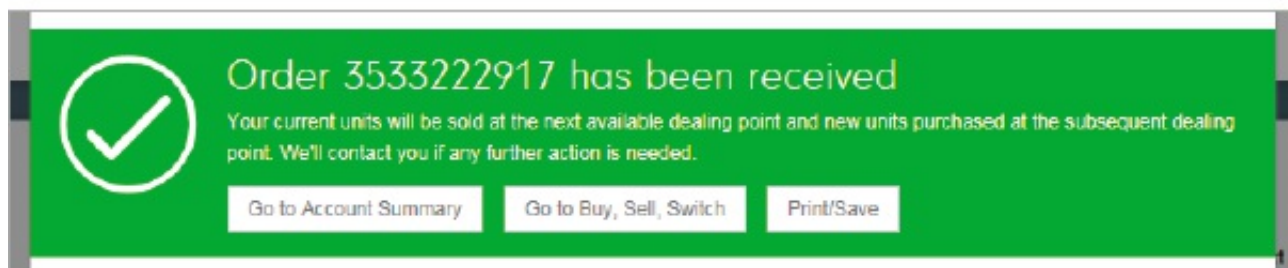


#### Important information

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 confirmation of your order. Your units will be sold at the next available dealing point and new units bought at the following 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 this guide useful.

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

