Use this step by step guide designed to help you get started.
# How to switch an investment

## 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.

<table>
<thead>
<tr>
<th>Page 3</th>
<th>Before you begin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page 4</td>
<td>Getting started</td>
</tr>
<tr>
<td></td>
<td>Logging in</td>
</tr>
<tr>
<td>Page 5</td>
<td>Getting to the switch page</td>
</tr>
<tr>
<td>Page 6</td>
<td>Choosing the investment to sell</td>
</tr>
<tr>
<td></td>
<td>Add an investment to sell</td>
</tr>
<tr>
<td></td>
<td>Select the investment</td>
</tr>
<tr>
<td></td>
<td>Choose the amount or quantity</td>
</tr>
<tr>
<td>Page 7</td>
<td>Choosing the investment to buy 1 of 2</td>
</tr>
<tr>
<td></td>
<td>Add an investment to buy</td>
</tr>
<tr>
<td></td>
<td>Search for the investment</td>
</tr>
<tr>
<td>Page 8</td>
<td>Choosing the investment to buy 2 of 2</td>
</tr>
<tr>
<td></td>
<td>Choose the amount or quantity</td>
</tr>
<tr>
<td>Page 9</td>
<td>Placing your switch</td>
</tr>
<tr>
<td></td>
<td>Review your order</td>
</tr>
<tr>
<td></td>
<td>Agree to our terms</td>
</tr>
<tr>
<td>Page 10</td>
<td>Confirmation</td>
</tr>
</tbody>
</table>
How to switch an investment

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.
How to switch an investment

GETTING STARTED

Go to the Fidelity homepage

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

Log in with your username and password

Homepage link: [www.fidelity.co.uk](http://www.fidelity.co.uk)
How to switch an investment

GETTING TO THE SWITCH PAGE

Go to Manage investments > Buy, sell, switch

If you have more than one account, select an account

Select Switch

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

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.
How to switch an investment

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**

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

Add the investment by selecting **the name** or +

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

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.

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

Decide how much of each investment to buy.

You’ll need to decide the split between your chosen investments where the total will need to add up to 100%.
How to switch an investment

PLACING YOUR SWITCH

Select **Preview Order**

Review your order

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

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

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**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.
How to switch an investment

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.
How to switch an investment

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.

Hope this guide was helpful in assisting you through the journey.