

HOW TO REGISTER FOR ONLINE ACCESS

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 step 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 Customer Reference Number
- Your National Insurance Number or Fidelity account number
- Access to your email address

Your Customer Reference Number is ten digits long starting 100- and you can find it on your welcome letter or one of your statements that you receive every 6 months.

Your National Insurance Number or account number. You can find your National Insurance Number on your payslip, a P60 or a tax letter. Your account number can be found on any transaction confirmation letter.



Important information

If you have accounts with us but don't have online access to them, this guide shows you how to get started.

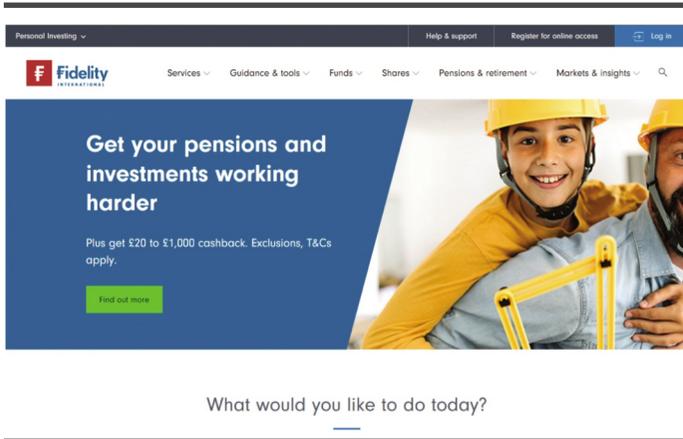
The images used in this guide are for illustration purposes only and should not be construed as recommendation to buy or sell any investments. When reviewing the performance of your investments, it's also important to remember that past performance is not an indicator of future performance. Fidelity Personal Investing does not give financial advice. If you need advice, please speak to a financial adviser.

Don't have account with us yet? You can [open an account with us here](#).

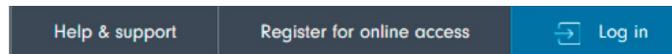
GETTING STARTED



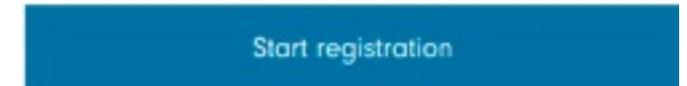
Go to the Fidelity homepage



Select **Register for online access** at the top right corner of the page



Select **Start registration**



USERNAME REGISTRATION 1 OF 2



Select **Start registration**

- Your Customer Reference Number.** You can find this on your Valuation and Statement letter.
- Your National Insurance number or account number.** You can find your National Insurance number on your payslip, P60 or tax letters. Your account number can be found on any transaction confirmation letter. If you don't have a letter, please [call us](#) and we can tell you your account number.
- Access to your email address** so we can verify it for when we need to contact you.

Start registration

Before you begin, you will need your Customer Reference Number, National Insurance Number or Account Number and access to your email.

Enter your details

Title

Title

First name

Last name

You will need to enter something for every field here.

Create your username and password

Create a username

You can choose a username with at least six characters. You can also use your email address if you like.

Create a password

You can use your email address if you like. The username should be something that is memorable to you. Keep these details safe as you will need these to log in to your account.

USERNAME REGISTRATION 2 OF 2



Choose how you want Fidelity to contact you

Stay well informed

We want to help you make the most of your investments, and one way we can do this is to give you the latest news and analysis. We have fund manager interviews and fund research as well as market and economic perspectives from across our expert teams.

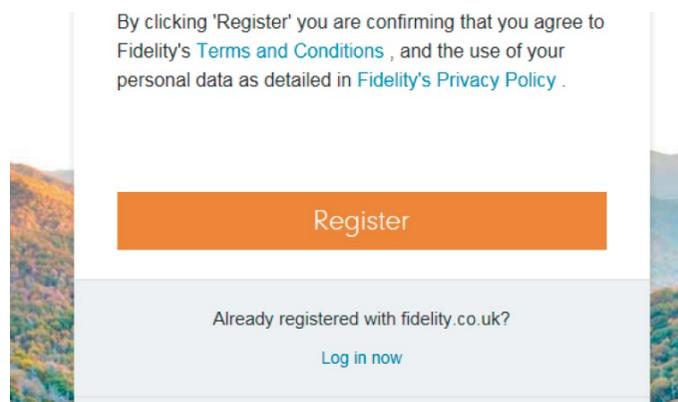
To help us work in the way that best suits you, please tell us how you would like to get this information. If you would prefer not to receive these please un-tick the boxes below. You can opt out of these communications at any time.

- Email updates of Fidelity's market views and product updates.

Tick the boxes if you would like to opt in to email updates and newsletters and if it is ok for us to update you by phone and post.



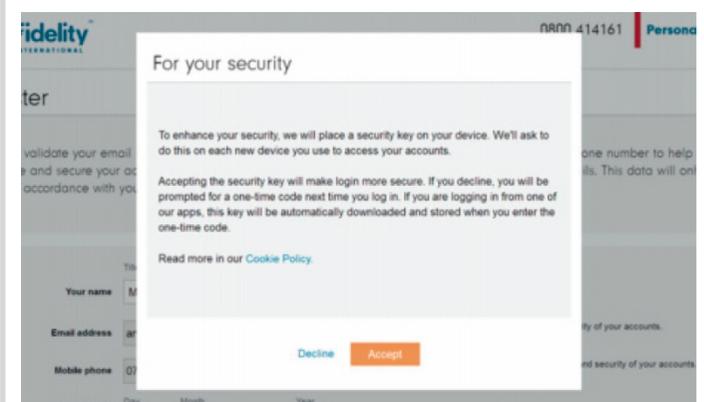
Confirm that you agree to our terms by selecting **Register**



Important information

Please review all of our terms and policies. Please read each one carefully. Once you are happy with everything, select the box provided to show that you accept the terms within.

Choose to **accept** or **decline** the security key



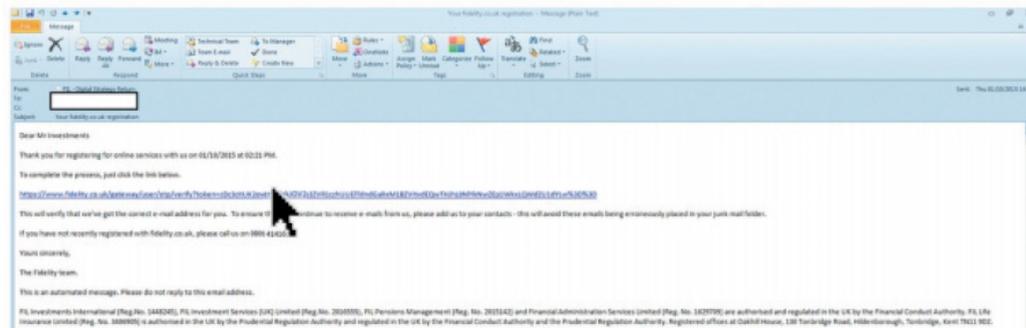
A pop-up box will appear explaining how we recognise your computer, phone or tablet each time you log in.

If you select 'Accept', we will remember your device the next time you log in. Only do this if you are using your own device rather than one in a public area.

VERIFY AND CONFIRM REGISTRATION



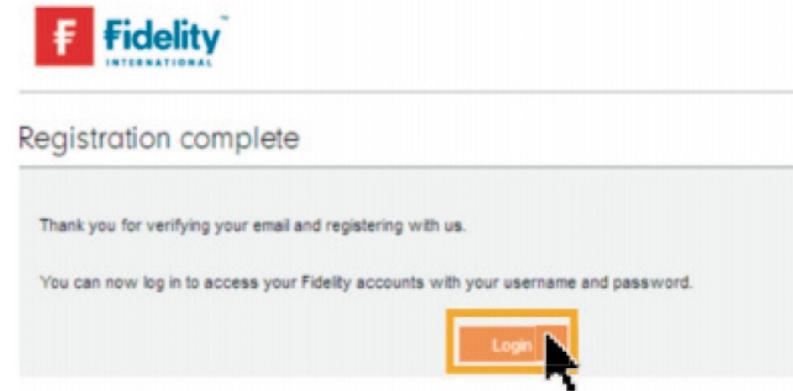
Check your emails and open the link we send you



Check your inbox as you will receive an email from **registration@service.fidelity.co.uk**. Opening this link will allow us to verify your email. Please be aware that this link expires after 30 minutes.

If it isn't in your inbox, you may need to check your junk or spam folders. Alternatively, you can request another one by logging in.

Confirmation and next steps



After opening the link, a new window will open confirming that your registration is complete.

Your registration is now complete. To access your accounts, select **Login**.

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.

