

HOW TO SWITCH YOUR INVESTMENTS

GETTING STARTED

HELP GUIDE

USE THIS STEP BY STEP
GUIDE TO HELP GET YOU
STARTED

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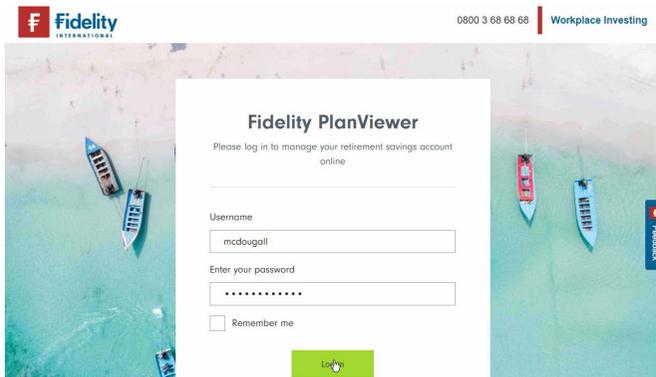
BEFORE YOU BEGIN

THINGS YOU WILL NEED

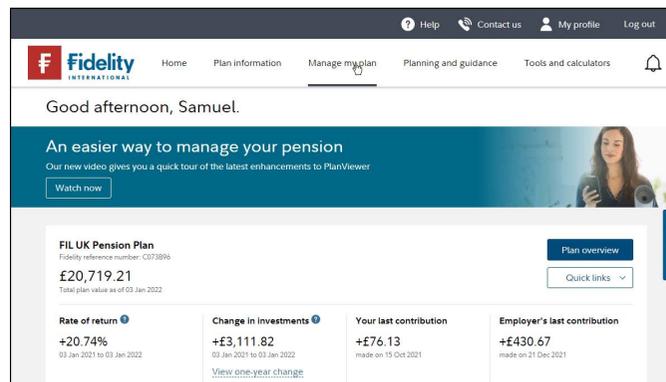
- **Your Fidelity PlanViewer username and password** (this would of been created by you when you registered as a new PlanViewer user)
- **Access to your personal email**

Go to planviewer.fidelity.com ➡

Enter your PlanViewer username and password, or use single sign on from your company portal to navigate to the home page.



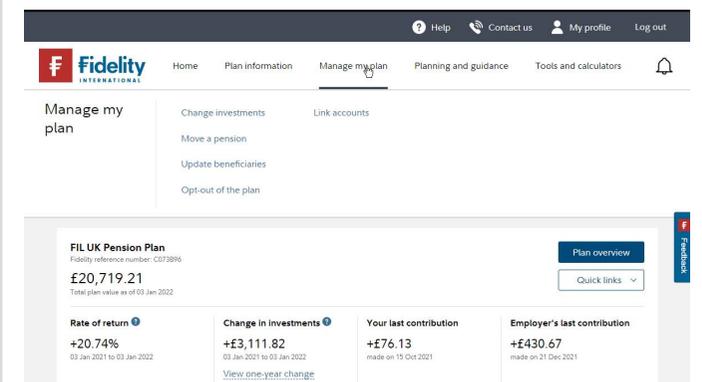
Upon logging in, you'll be taken to the home screen, that will look similar to this.



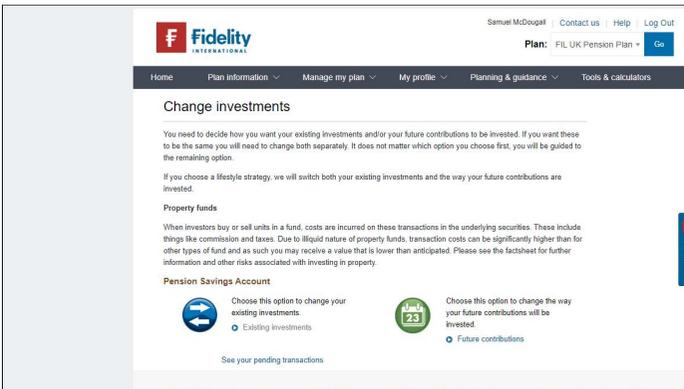
At a glance you will be able to see your balance and how your funds have been performing.



To change your investments on PlanViewer click on the Change Investments link under the Quick Links icon or click on the Change investments tab under the Manage my plan ribbon.

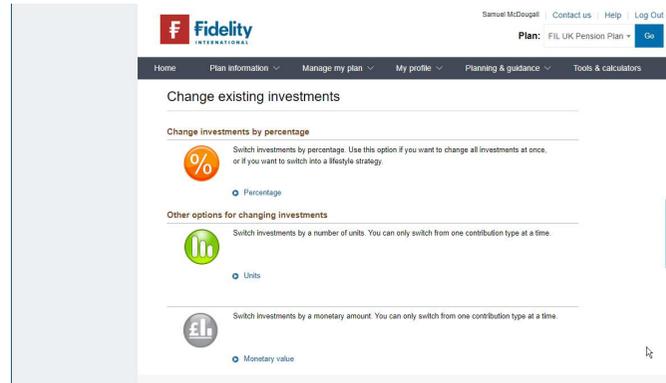


First of all, are you making an investment choice that applies to what you have built up to date or does this investment choice apply only for future contributions?



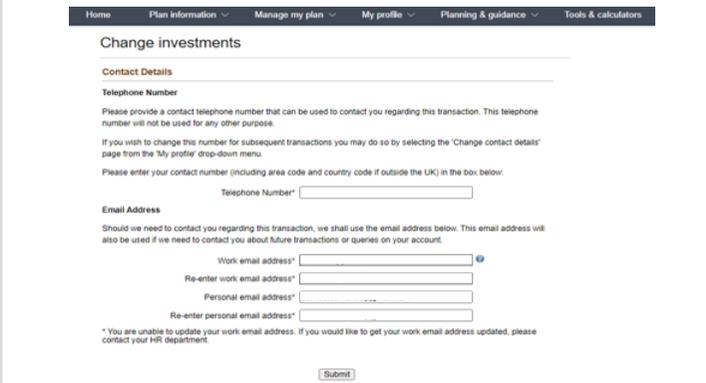
Click on the button that applies to you.

⇒ To change your existing investments, select Existing investments. You will now be asked to choose a method for switching your existing investments. This can be done in three ways:



by percentage, by reallocating units or by moving a specific amount from one fund to another.

⇒ Once you have chosen your preferred method, you will be asked for your contact details should we need to contact you.



To change your existing investments by percentage, click on the drop-down box to see all the contribution types in your account.



While you are switching please don't use the back button or this will temporarily lock your account. PlanViewer will prompt you on how to unlock your account.



You will now be able to allocate the percentage in each fund or funds according to your choice. You do this by clicking on the + or - boxes. Make sure your allocation totals 100%.

Change existing investments by percentage

You can choose to switch one contribution type at a time; this means you can have a different investment strategy for different types of contribution. If you want the same investment strategy for all contribution types then you can select 'All'.

Contribution Type

- All
- Company (post 97)
- Company Matched (post 97)
- Employee Matched (Post 97)
- Salary Sacrifice
- Transfer In (post 97)

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A contribution payment is allocated according to its source such as a company contribution, an employee contribution, a transfer and so on. This is known as the contribution type. If you want the same investments for all contribution types, click All and press Go.

Change existing investments by percentage

You can choose to switch one contribution type at a time; this means you can have a different investment strategy for different types of contribution. If you want the same investment strategy for all contribution types then you can select 'All'.

Contribution Type:

You are currently invested as highlighted below. Choose whether you wish to self select your investments or invest in a lifestyle strategy.

Self Select
 FIL FutureWise Lifestyle Strategy
 Annually Targeting Lifestyle Strategy

Choose your funds from the tables below:

Fund Name	Fund Code	Current Allocation (%)	Split (%)	New Allocation (%)
Fidelity Cash Fund	LDAB	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Fidelity Diversified Growth Fund	LACA	0.00	<input type="text" value=""/>	<input type="text" value=""/>

If you want to spread your investments between different funds, you can choose to switch one contribution type at a time. This means you can have a different investment choice for different types of contribution.

Manage my plan

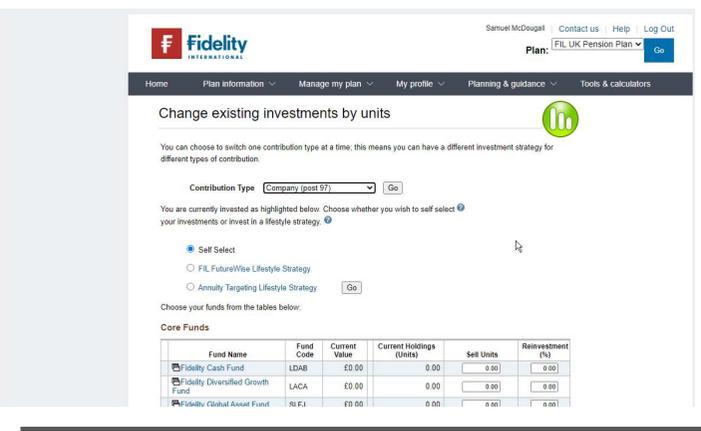
Fund Name	Fund Code	Current Allocation (%)	Split (%)	New Allocation (%)
Fidelity Diversified Growth Fund	LACA	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Fidelity Global Asset Bond Fund	SLFJ	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Fidelity Index Linked Bond Fund	LLBD	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Fidelity Institutional UK Fund	LFIU	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Fidelity Long Bond Fund	LOBD	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Fidelity UK Long Corporate Bond Fund	LCBD	0.00	<input type="text" value=""/>	<input type="text" value=""/>

Extended Funds

Fund Name	Fund Code	Current Allocation (%)	Split (%)	New Allocation (%)
Blackrock European Index Fund	KDAP	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Blackrock Japanese Index Fund	KDAC	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Blackrock Pacific Rim Index Fund	KDAB	49.93	<input type="text" value=""/>	<input type="text" value=""/>
Blackrock US Index Fund	KDAE	50.07	<input type="text" value=""/>	<input type="text" value=""/>
Blackrock World (ex UK) Index Fund	KDAA	0.00	<input type="text" value=""/>	<input type="text" value=""/>
BMO Responsible UK Equity Growth Fund	K3MD	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Fid Emerging Markets Total Return Div Fd	LUUB	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Fid Sustainable European Equity	LADA	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Fidelity American Fund	LACI	0.00	<input type="text" value=""/>	<input type="text" value=""/>
Fidelity American Special Situations Fd	LACE	0.00	<input type="text" value=""/>	<input type="text" value=""/>

If you'd like to start again, click Reset. Once you select Next, you will be able to review the changes you've made and if you're happy you're happy, click Submit.

If you choose to change your investments by unit allocation: each contribution buys units in a fund. The number of units you hold x the value of those units determines the value of your account. To change your investments by unit allocation first decide how many units you wish to sell from your investment.

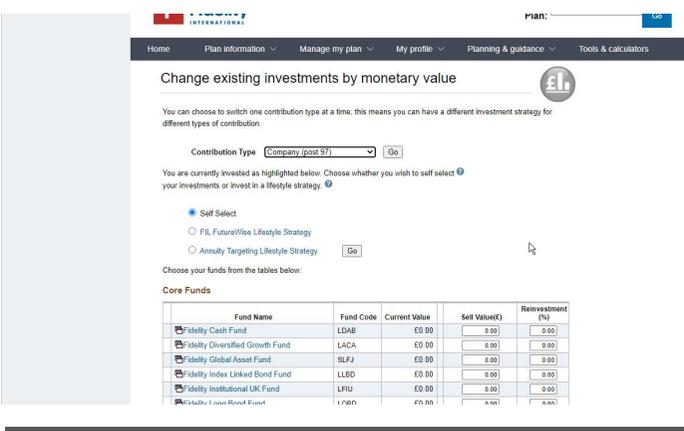


Allocate a percentage into your new fund choice or choices, making sure your allocation adds up to 100%.

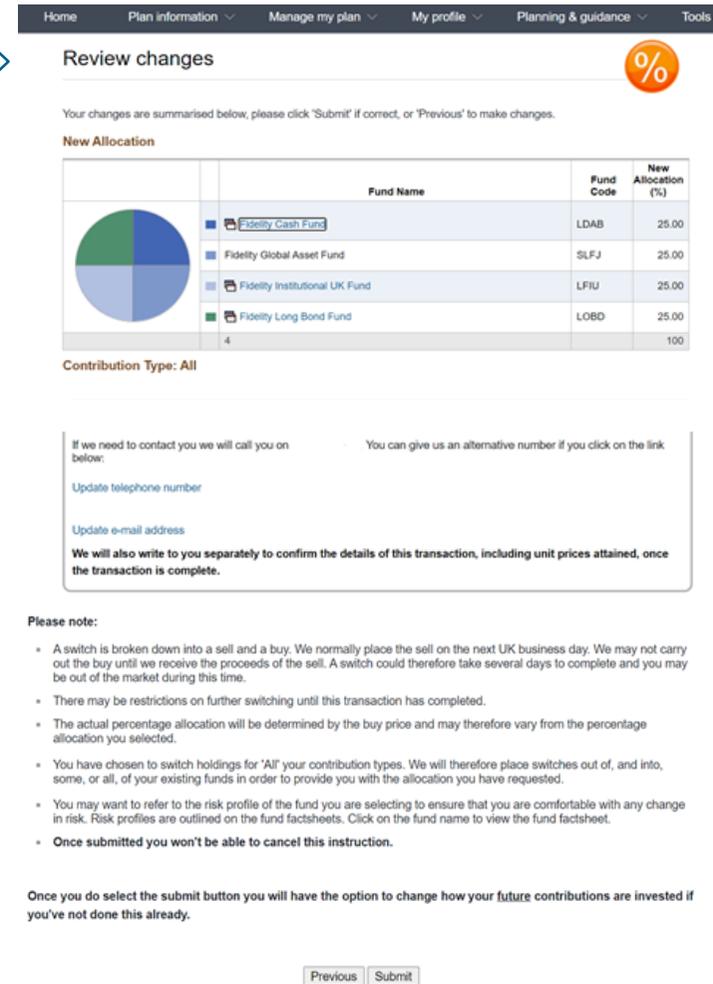
Once you select Next you will be able to review the changes you have made and if you are happy you can click Submit.



If you choose to change your investments by monetary value: first of all, choose how much you wish to sell by entering a value in the sell value column, then allocate a percentage into your new fund choice or choices, making sure your allocation adds up to 100%.



As before, once you select Next you will be able to review the changes you have made and if you are happy you can click Submit.





Please note:

- A switch is broken down into a sell and a buy. We normally place the sell on the next UK business day. We may not carry out the buy until we receive the proceeds of the sell. A switch could therefore take several days to complete and you may be out of the market during this time.
- There may be restrictions on further switching until this transaction has completed.
- The actual percentage allocation will be determined by the buy price and may therefore vary from the percentage allocation you selected.
- You have chosen to switch holdings for 'All' your contribution types. We will therefore place switches out of, and into, some, or all, of your existing funds in order to provide you with the allocation you have requested.
- You may want to refer to the risk profile of the fund you are selecting to ensure that you are comfortable with any change in risk. Risk profiles are outlined on the fund factsheets. Click on the fund name to view the fund factsheet.
- **Once submitted you won't be able to cancel this instruction.**

Once you do select the submit button you will have the option to change how your future contributions are invested if you've not done this already.

Previous Submit

Mirror my instruction for future contributions



Choose this option to select the same funds (as your existing investments) for your future contributions

Mirror fund choice

Different instruction for future contributions



Choose this option to select different funds for your future contributions

Different fund choice

Exit

You'll be asked if you want to mirror your instruction for future contributions by clicking on Mirror fund choice or if you wish to make a different fund choice.

Please note while you can have different strategies for different types of contribution, you can only have one strategy within a contribution type. This means that if you switch from a lifestyle strategy into another lifestyle strategy or Self-select, or from Self-select into a lifestyle strategy, all existing holdings and future contributions in that strategy will also be switched.

THANK YOU

We hope you found it useful.

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

