

HOW TO EDIT AN
INVEST@WORK
REGULAR
SAVINGS PLAN

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 new choice of investment or amount for the savings plan



Important information

You can choose to put this money into cash or into investments which you have selected. You can edit these details at any time (although any changes may take a few days to be reflected in your plan).

Need help choosing investments?

Whether you're a beginner or an advanced investor, we have the tools to help you find the right investment for you.

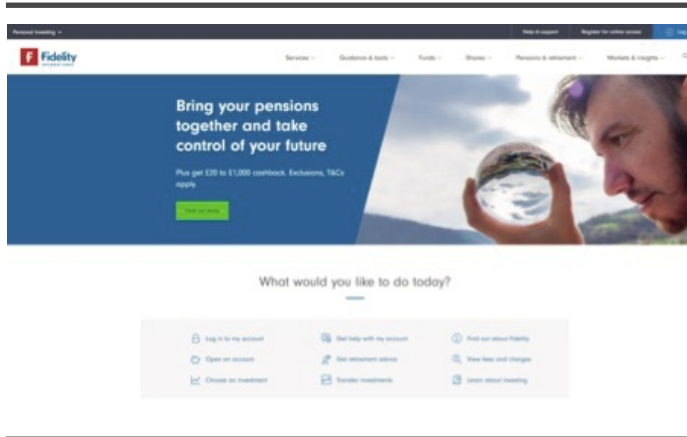
Tell us your risk preference and we'll give you a couple of fund options to consider using **PathFinder**.

Browse a list of our experts' favourite funds using **Select 50**.

Use the **Investment Finder** to search and filter the thousands of investments on offer.

GETTING STARTED

Go to the Fidelity homepage



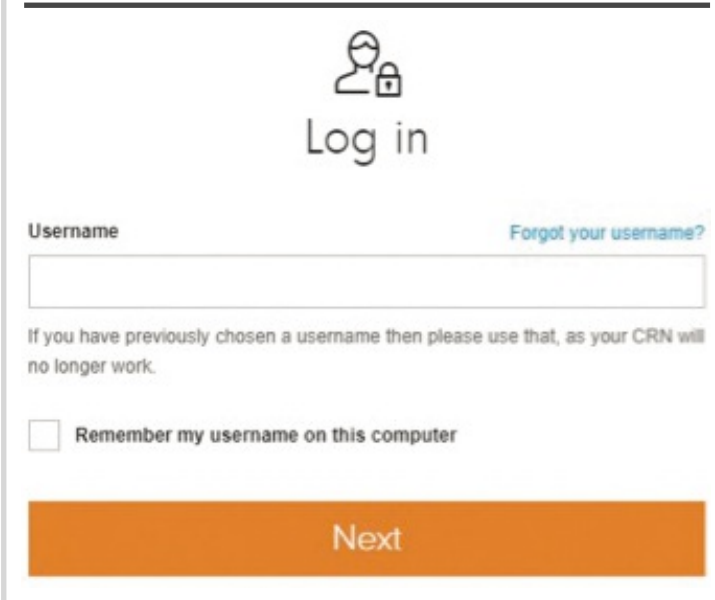
Link: www.fidelity.co.uk



Select **Log in**



Log in with your username



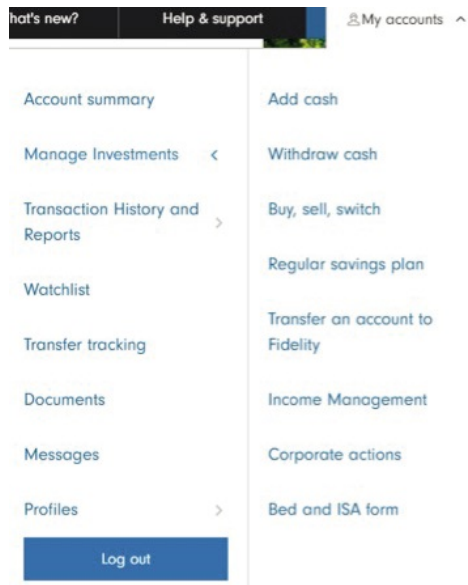
If you have previously created your own username then please use that.

If you don't have online access, you can register on the link at the bottom of the website page.

GETTING TO THE EDIT SAVINGS PLAN PAGE

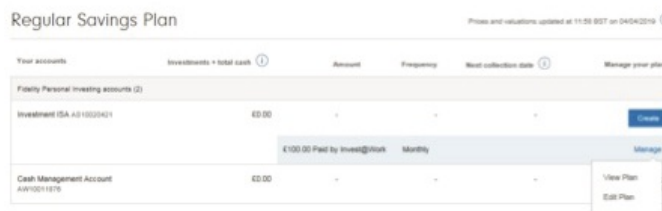


Navigate to the savings plan homepage



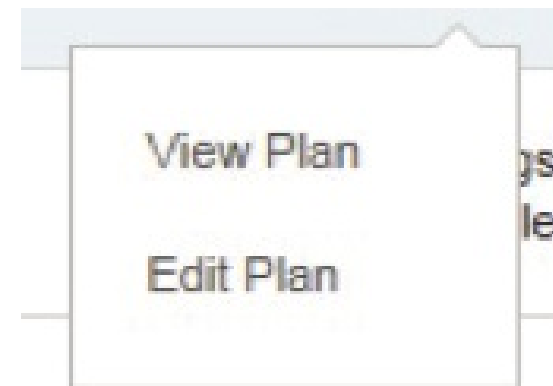
Open the 'My accounts' menu in the top right corner of the page, select 'Manage investments' and then 'Regular savings plan'.

Find the plan you want to edit



Your Invest@Work regular savings plan will show 'Paid by Invest@Work' in the amount column.

Select **Manage**, and then **Edit Plan**



EDITING YOUR PLAN



Edit your contribution details

Contribution details

Amount The minimum payment is £50.

Frequency Monthly

Your current contribution details will appear in the 'Contribution details' section. You can change this or keep it the same.

If you use a benefit provider, this field will be disabled as you will need to update with them directly.


To cancel your contributions, enter £0 as an amount.



Edit your contributions

Investment details

Investment name	Cost per share	% of contribution	Approx. amount (£)
Save as cash			
Cash	N/A	0.00 %	£0.00
OEICs and Unit trusts (*)			
Fund manager buy/sell charge %			
Fidelity Multi Asset Open-Defence Fund % Accumulation	0.88	100.00 %	£100.00
Total		100.00%	



You can change the amounts of your current investments or add new ones.

To add new investments, click the 'Add investments' button.

Select **Save changes**

Cancel

Save changes

If you need any help, please call us on 0800 368 0890.

CONFIRMATION OF YOUR CHANGES

Confirmation



Your request has been submitted

Confirmation that your changes have been submitted will be provided.

THANK YOU

We hope you found it useful.

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

