

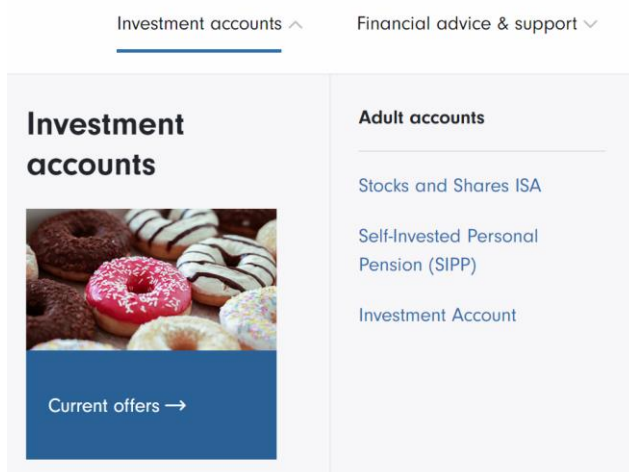
## How to open a Fidelity account (excluding SIPPs)

If you want to open either a Stock and Shares ISA or an Investment Account with Fidelity, you can use this guide to help you through the online process.

### Overview when Opening an Account:

1. About You (Steps 5-8)
2. Review Details (Steps 9-10)
3. Add Money (Steps 11-12)
4. Invest (Buy an investment)

1. Go to [www.fidelity.co.uk](http://www.fidelity.co.uk)
2. Click on 'Investment accounts' from the top menu of options on the page before selecting either 'Stocks and Shares ISA' or 'Investment Account'




**Please note**, if you would like to open either a SIPP or a Junior SIPP, visit our [how to open a SIPP guide](#) for a step-by-step walkthrough of this process.

3. Read the relevant information, and once you have decided on the right product, click on either 'Open a Stocks and Shares ISA' or 'Open an account' for an Investment Account.

Open a Stocks and Shares ISA

Open an account

4. This will open the checklist pop-up on your screen. Ensure you are ready to progress with the required information, and click 'I'm ready'.
5. This will open the 'Open your account' panel on your screen. The first step is to complete the 'About you' section where you are required to complete the fields provided. You can find more information on some of these fields by clicking on  where applicable.



**Please note**, if you have already registered for online access, click on 'Log in' at the top of the panel to make the process easier. To access a walkthrough for our log in process, visit the [how to log in guide](#). To open an account once logged in, click on 'Manage Investments' and then select 'Open an account' under the 'Invest' heading.

6. Create a username and password for your Fidelity account by entering these details and ensuring you keep a safe record of these as you will need them to log into your account. You can easily use your email address as your name by selecting 'Username same as email'.

Username and password

Create a username

Username same as email

Your username must have at least six characters. You can also use your email address as username if you like.

Create a password

Your password must have at least six characters, including a capital letter and a number or symbol.




7. Select how you would like Fidelity to contact you under 'Access our expert financial insights'.



**Please note**, you can change these preferences anytime online, and you can use our [how to change your communication preferences guide](#) for a step-by-step walkthrough.

8. Confirm you have read the 'Confirmation' at the bottom of the panel and click 'Next' to proceed.
9. Review your details and click 'Edit' for any information you would like to amend. If you are opening a Fidelity account after being referred by someone, click on 'Tell us who referred you' to sign up for our referral offer.
10. Click on 'Confirm' once you are happy with the details provided.
11. This will open the 'Add money' section on your screen. Choose how you would like to move the money into your Fidelity account from the options provided, and select the relevant box. There will be three options available to you:

Choose how you would like to invest with us

 Make a single payment	 Set up a Regular Savings Plan
 Transfer my investments	



**Please note**, you may receive a notification that some additional checks are required before you can add money to your account due to our Anti Money-Laundering processes. This means we will require some extra documents from you to verify your identity. For more information on how to provide these documents, visit our page on [checking your identity](#).

- a. **‘Make a single payment’**: a minimum of £1000 is required to open your account. Input the details requested, and for further information on these fields, click on . Click ‘Confirm’ and follow the relevant payment instructions on the next page when requested.

Source of this investment

Payment method



**Please note**, for extra guidance to make a single payment, visit our [how to add cash guide](#) and follow the process from Step 7.

- b. **‘Set up a Regular Savings Plan’**: a minimum regular payment of £25 is required to set up your Regular Savings Plan. Input the details requested, and for further information on these fields, click on .

Frequency

Collection date

Your first collection date is: 01 August 2023

Source of this investment



**Please note**, for extra guidance to set up a Regular Savings Plan, visit our [how to set up a Regular Savings Plan guide](#) and follow the process from Step 8.

- c. **‘Transfer my investments’**: select this option and click on ‘Confirm’ if you wish to proceed with transferring your investments into your Fidelity account. Your account will be generated shortly after.



Please note, once your account has generated, you can transfer your investments into Fidelity by clicking on ‘Manage Investments’ and selecting ‘Transfer an account to Fidelity’.

12. You'll see a confirmation of your request to open an account and to add cash. The time it takes for us to receive your cash can vary by the payment method selected as payments can be made immediately by debit card, but payments by bank transfer or cheque are not immediate.



**Please note**, it can take a couple of days for this cash to settle within your account and be available to invest.



**Please note**, once your account has been opened and your cash has settled in the account, don't forget to invest it in any investments you would like to buy into. If you need helping finding the right investment, visit the [how to search for investments guide](#), and to access a walkthrough for buying into investments, visit either the [how to buy a fund guide](#), or the [how to buy an exchange-traded instrument guide](#).



Having followed this guide, you should now have successfully completed this journey. If you use this guide and still require some additional help, visit our [Help and Support page](#).

For more guides like this one, visit our [How-to Guide page](#) for a full list of our step-by-step walkthroughs.