

Fidelity Account Registration Guide

Website Guide

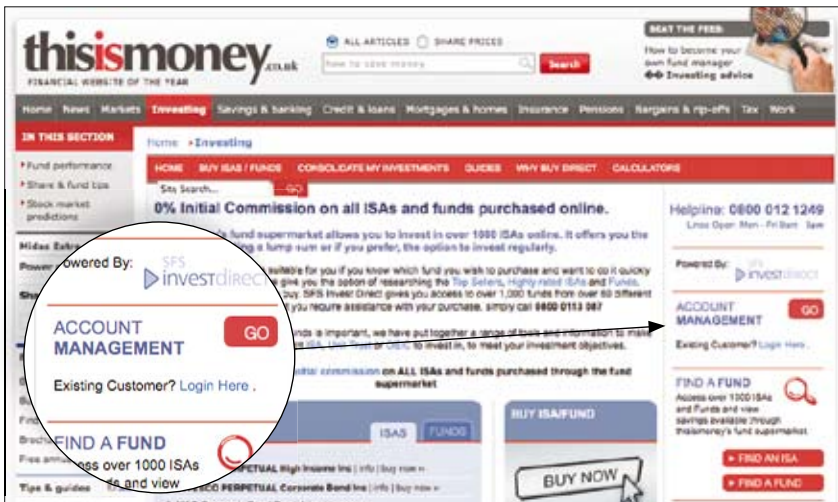
This website guide contains all the information you need to set up your own online account by following this easy to use, step by step process.

Before you start, you will require the following details to complete your registration:

- Your **Fidelity** client reference
- Your **Fidelity** pin number
- Your date of birth (The number beginning '100')
- Your **Fidelity** password
- Your home address
- Your **Fidelity** account number
- A valid email address

STEP 1: First of all, you will need to visit www.sfsinvestdirect.co.uk/thisismoney/.

STEP 2: Once the page is loaded you will find yourself on the Thisismoney homepage. From there you will need to click on **Account Management**, which is on the right hand side of the page, as illustrated below.



The screenshot shows the homepage of thisismoney.co.uk. At the top, there is a navigation bar with 'Home', 'News', 'Markets', 'Investing', 'Savings & banking', 'Credit & loans', 'Mortgages & homes', 'Insurance', 'Pensions', 'Bargains & rip-offs', and 'Tax Work'. Below this is a search bar and a 'BEAT THE FEES' banner. The main content area features a red navigation bar with 'HOME', 'BUY ISAS / FUNDS', 'CONSOLIDATE MY INVESTMENTS', 'QUICKS', 'WHY BUY DIRECT?', and 'CALCULATORS'. A large promotional banner for '0% Initial Commission on all ISAs and funds purchased online.' is visible. On the right side, there is a 'Helping: 0800 012 1249' section and a 'POWERED BY: SFS investdirect' logo. A red circle highlights the 'ACCOUNT MANAGEMENT' button, which is located in the 'POWERED BY' section. Below the button, there is a 'GO' button and a 'Existing Customer? Login Here' link. The bottom of the page features a 'FIND A FUND' section with a search bar and a 'BUY NOW' button.

STEP 3: After clicking **Account Management**, choose **Name Log in** and enter your name, address and date of birth. You also need to enter your **PIN** and **Password** (you will have chosen this when taking out the investment). Once logged in, click **link accounts** and enter **Account Number** (sent by Fidelity) and **Customer Reference Number** (sent by SFS).



The image shows a screenshot of the SFS InvestDirect website's login page. The page has a blue header with the SFS InvestDirect logo on the left and 'Skipton Invest Direct' on the right. Below the header, there is a 'Login' section with two tabs: 'Number Login' and 'Name Login'. The 'Name Login' tab is selected. The form includes a 'Customer Reference Number' field with a note '10 digit number starting with "1"', a 'Remember this information' checkbox, and a 'PIN' field with a 'Remember your PIN?' link. A 'Next' button is located below the PIN field. A circular callout highlights the 'Name Login' section, showing a 'Reference Number' field, a 'Remember this information' checkbox, a 'PIN' field, a 'Remember your PIN?' link, and a 'Next' button. A security notice at the bottom states: 'For your security, you will be logged out automatically after 30 minutes of inactivity on this site. This electronic service and the information contained within it are directed only at persons permanently resident in the United Kingdom. Access to this electronic service by persons not permanently resident in the United Kingdom, including without limitation US persons within the meaning of Regulations of the US Securities Act 1933, is not permitted.'

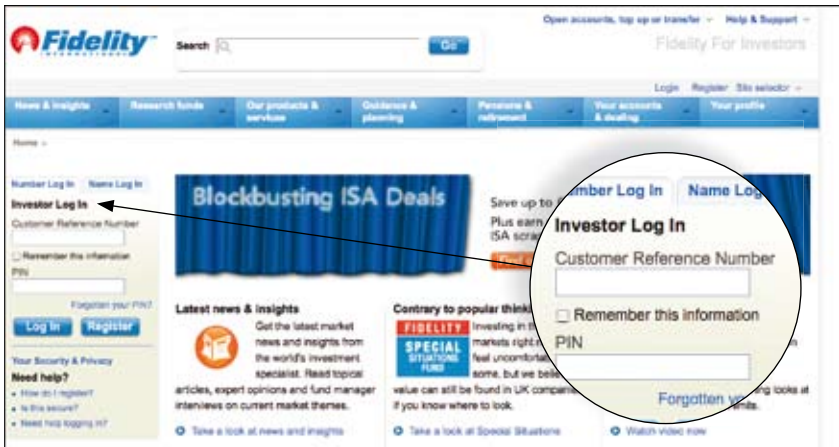
STEP 4: When your details have been checked, your personal account page will be launched.

From here, you will be able to get up-to-date valuations, analyse your portfolio and manage your accounts.

For security, please remember to log out when you have finished your session.

Normal Log in

To log in to your account, simply go to the Fidelity homepage at www.fidelity.co.uk and enter your **Client Reference** (the number beginning '100') and the **PIN** you have set up before selecting **Log in**.



For security, you will be prompted to complete three random letters of your password. Once you have done this, click on **Next** and you will have immediate access to your account.

Require further help?

If you are experiencing any problems registering or logging in to your account, please contact a member of our Client Helpline on:

 **0800 085 0459**



Financial advice is provided by:
Skipton Financial Services Limited,
The Bailey, PO Box 101, Skipton, North Yorkshire BD23 1XT
Tel: 0845 6036146 Fax: 0845 6024577 Web: skiptonfs.co.uk

TRUSTED

We are experienced and trusted financial advisers so we only recommend the solutions that are right for you

CLEAR

Everything is clearly explained in plain English and we are always open and honest in our approach

INFORMED

Our advice teams are experts and carry out continuous research to give you the most informed financial choices