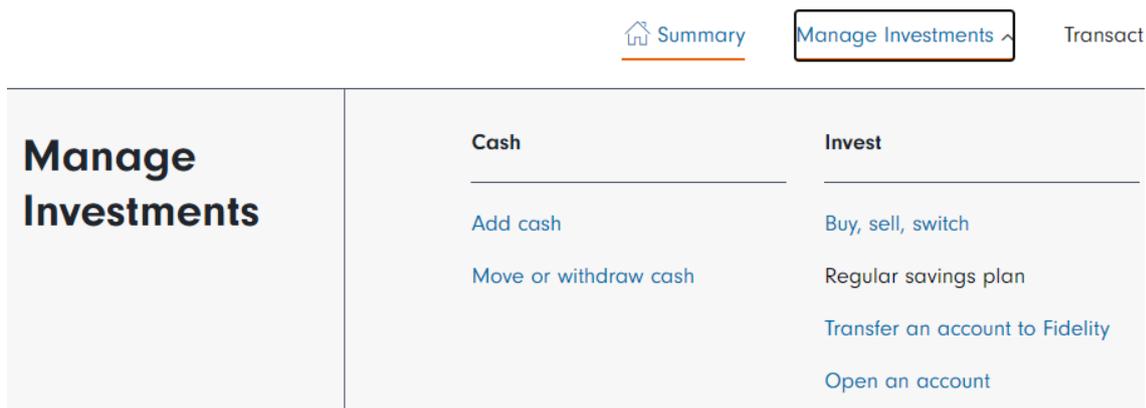


How to set up a Regular Savings Plan for your Fidelity account

If you want to make regular contributions to your Fidelity account, you can set up a Regular Savings Plan to invest on a monthly, quarterly, semi-annual, or annual basis.

1. Go to www.fidelity.co.uk
2. Click on 'Log in' at the top right corner of the page before following the log in process. To access a walkthrough for our log in process, visit the [how to log in guide](#).
3. The first screen you'll see is the Account Summary page. From the top menu of options on Account Summary, click on 'Manage Investments'.



4. Then choose 'Regular savings plan' under the 'Invest' heading.
5. This will open the 'Regular Savings Plan' panel on your screen.
6. Click on 'Create' for the relevant account where you would like to set up a Regular Savings Plan.
7. This will open the 'Create a Regular Savings Plan' panel on your screen, which shows the amount within your chosen account, along with any relevant annual allowance, according to your Fidelity contributions.
8. Type in the amount you wish to regularly invest in the 'Amount' input box, and select the frequency with which you would like to make these payments.

Contribution details

Amount	£ <input type="text" value="0"/>	The minimum payment is £25.
Frequency	<input type="text" value="Monthly"/>	



Please note, there is a minimum payment of £25 per investment you want to buy into on a regular basis.

- Select the 'Collection date' you would like each regular payment to be taken from the options provided. An estimate for the next collection date given your choices will be displayed.



Please note, it can take up to 12 working days to set-up an RSP. This will be considered when the estimated collection date is provided.

- Click on the dropdown under 'Source of this investment' and select the relevant category. You can find more information on this field by clicking on .
- Click on 'Please select a bank account' to choose where your Regular Savings Plan contributions will come from. Here, you will have two options - either:
 - Choose a verified bank account that we have on record and click on 'Next'.
 - Add a new bank account by selecting 'Add or manage bank account'. A message will then appear which offers you a link, enabling you to navigate to your 'bank account hub' where you can add your bank details. Once added and verified you will return to this screen where you can select your newly verified account.

Contributions will be made from this account

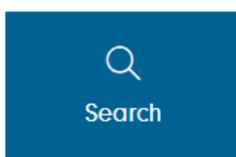
Please select a bank account



Please note, to set up a new account we will need to verify your account details. Firstly we run an automatic check, however if this is unsuccessful we will need you to upload proof of identity and bank account which will need to be reviewed. This may take a few days.

- Select if you are the only person required to authorise debits from the selected account, and read the 'Direct Debit Guarantee'
- Click on 'Next' if you wish to proceed. You will then need to review, and confirm the Direct Debit details you have provided.
- This will open the 'Decide where to invest your contributions' panel on your screen. To regularly buy into investments through your Regular Savings Plan, click on 'Add investments'
- Select the relevant investment either by using 'Search', or by investing in an asset you already hold under 'Your investments'

Add investments



16. Click on **+** for any investments you would like to regularly invest in and click 'Done' once you have finished your selection process.
17. Type the proportion of your contribution you want allocated to each investment under '% of contribution'. The total percentage must add up to 100%.

% of contribution

18. Click on 'Confirm' to proceed. This will then display a 'Declaration' which, once confirmed, will allow you to click 'Next'.



Please note, setting up a Regular Savings Plan may affect your fees and charges. For some more information on this, visit [Our Investment Fees and Charges Page](#).

19. You'll see a confirmation of your request to set up a Regular Savings Plan. As mentioned above, Regular Savings Plans can take up to 12 working days to set-up.



Please note, if you would like to amend a Regular Savings plan which you have already created, you can access a walkthrough for this by visiting the [how to amend a regular savings plan 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.