

OBC.Batch.Seq.No:UK

Mr A B Sample FAS NOT Web
1 Sample Street
Sample Town
Sample County
AB1 2CD

How to get in touch

Please contact: Sample Advisers Ltd

Alternatively

Web: fidelity.co.uk/clients

Freephone: 0800 358 4060

Mon-Fri 8:30am-5:30pm

You'll need this reference if you call:

XX99999999

11 September 2025

Dear Mr Sample

We're moving your communications online

We believe online communications are a better and safer way for us to communicate with our customers. From 19th September 2025, we plan to move the communications we send you to our secure online document service.

Registering for your online service

You need to register for your online account to see all your important documents in one place, including statements and valuations.

To get started you'll need your:

- Customer Reference number (included in the right-hand side blue box)
- National Insurance number
- Access to your preferred email address to receive a verification code

If you need additional registration support, please visit fidelity.co.uk/clients/help-and-support

The benefits of your new digital service

Once registered, from the above date, you'll receive an email to let you know when there's a new communication to read online. You'll just log in to your Fidelity account online or through our app.

There are four main advantages to using online communications as a better way of keeping in touch with you:



Faster delivery

All your communications will be delivered on the day we send them, and you'll have 24/7 access to them.



Easier access

You can check back on older correspondence just by logging in, with search options to help you find exactly what you're looking for.

Your Customer Reference Number

999999999



The email address we hold for you is

a***e@gmail.com**

Continued overleaf



Better Security

We won't be sending you important documents in the post. This cuts down on the risk of fraud. Just make sure you keep all your contact details up to date, so we can stay in touch with you.



Saves paper

You'll be saving paper with this change, as well as the environmental impact of printing and delivering your post.

Please check your email address

The email address we have for you on our system is shown in the blue box at the top of this letter. This is the address we'll use to send you notifications after we move you to our secure online document service.

It's important to keep your personal information up to date. Once registered, if you'd like to use a different email address, please change your details in your account or app as soon as possible.

This needs to be done before 19th September 2025 as we'll be sending a test email to the email address we hold for you.

- If the email is successfully delivered, we'll move you to our online service. You won't need to do anything in response, as we can tell when it arrives successfully.
- If you haven't received it by 19th September 2025, please check your spam or junk folder. If the test email hasn't arrived, this means we have been unsuccessful in validating your email address. We will therefore not move you to our online document service.

Here to help

Online communications can be a better option for most people; however, we do recognise that they're not right for everyone. If you feel they don't work for you and you need additional support, please contact your adviser or call us and we can explore other options with you.

You can also change your communication preferences yourself, by logging into your account and going to the 'Preference Centre' area of your online profile.

Updating how we look after you

While our terms and conditions already state that we are mainly an online-first service, we've updated them to reflect this change. It's worth remembering that there may still be times when we must send you something by post.

If you have any questions about this change, please contact your adviser or call us.

Yours sincerely

Your Fidelity Team

2 steps to ensure you are ready

- 1 Register for our online services. Visit fidelity.co.uk/accounts/register

Or scan here to get started



Click 'Start registration'

- 2 Please check that the email address shown above is the one you prefer. We'll use it to keep you updated about any new communications. If you want to change it, you can do so once you register.

You can also use our app. Just search for Fidelity.

