

OBC.Batch.Seq.No:UK
Mr A B Sample FAS Web
1 Sample Street
Sample Town
Sample County
AB1 2CD

18 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. That's why we plan to move you to our secure online document service during the week starting on 19th September 2025.

From this date, you'll receive email notifications that let you know when there's a new communication to read online. To see all your important documents in one place, including statements and valuations, you'll just log in to your Fidelity account online or through our app.

As part of this new service, please make sure we have your preferred email address.

The benefits of this change

We really believe online communications are a better way of keeping in touch with you. There are four main advantages:



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.



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.

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

Your Customer Reference Number

9999999999



The email address we hold for you is

a***e@gmail.com**

Continued overleaf

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, so if you'd like to use a different address, please update your details on our website as soon as possible. If you've forgotten your username or password, you can go to our website or app and click on the log in page to reset it.

We'll be sending a test email to this address (or the address you change it to) before 19th September 2025 and if that's successfully delivered, we'll go ahead and move you to our online service.

- If you receive this email, you don't have 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 it isn't there, this will mean we were unsuccessful and will not move you to our online document service.

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

Here to help

Although we believe online communications are a better option for most people, 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.

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 also worth keeping in mind that there may still be times when we have to send you something in the 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 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.**
- 2 Check that you are registered for our online services.**

Visit fidelity.co.uk/clients or scan here to get started



Click Log in

You will then be able to reset your password, update your details and view new communications.

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

