

# LINKING YOUR PLANVIEWER ACCOUNTS

A HOW-TO GUIDE

## HELP GUIDE

Use this step by step  
guide designed to help  
you get the most out  
of PlanViewer

## Linking your PlanViewer accounts

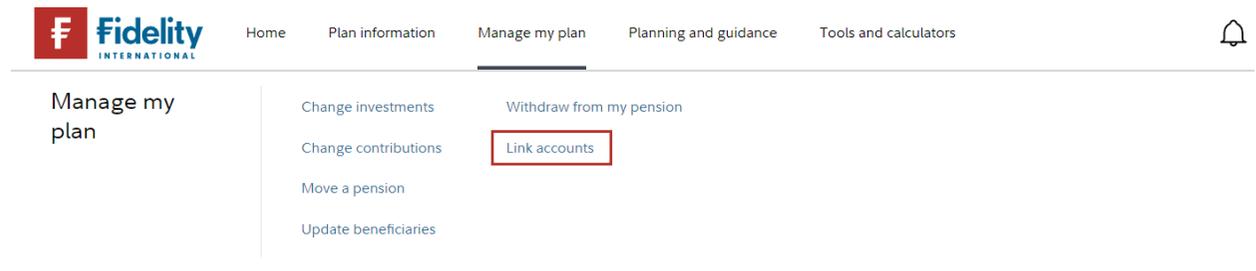
We are aware that some of you hold pension savings in more than one Fidelity account, so below is a step by step process to linking your separate accounts, so you can manage them all in one place.

### STEP 1

Make sure you have the usernames and passwords of all the individual accounts that you wish to link. You can reset these details on PlanViewer by going to 'Can't log in to your account?'

### STEP 2

Log in to PlanViewer on any one of your accounts and click the '**Link accounts**' link under 'Manage my plan'.



# Linking your PlanViewer accounts

## STEP 3

Please enter the usernames and passwords for the accounts you wish to link, and once all accounts are added press 'Link Accounts'.

### Link accounts

PlanViewer provides you the ability to link the plans you have access to together. To link your plans together, enter the username and password for each plan you want to link and 'click' the Add button.

To remove a plan from your list, select the appropriate check box and 'click' the delete button.

Username\*

Password\*

### Accounts to be linked

Plan	User Name	
FIL Personal Pension Plan	C0AC588	<input type="button" value="Delete"/>
FIL UK Pension Plan	fidx_C027CC9	<input type="button" value="Delete"/>

Fidelity International

25 Apr 2023

## STEP 4

You will now be required to create a new username and password for the Master Account. You can also choose which account is the default.

### Link accounts - Create account

PlanViewer has successfully linked your plans together. Please provide your Password so that a Master account for your linked scheme can be created.

PlanViewer allows you to nominate one of your plan as the default plan. If you have opted to have a default plan, PlanViewer will automatically select the plan whenever you log into the system using your master account.

You would be required to go through the registration process again during the next login.

Create new User Name\*

Re-enter new User Name\*

Create new Password\*

Re-enter new Password\*

### Accounts to Link

Default	Plan	User Name	Workgroup
<input type="radio"/>	FIL Personal Pension Plan	C0AC588	Member
<input checked="" type="radio"/>	FIL UK Pension Plan	fidx_C027CC9	Member

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To ensure the security of your account, PlanViewer Passwords must follow these rules:

1. The length must be a minimum of 8 and a maximum of 25 characters.
2. You must include characters from at least 3 of the 4 sets listed below:

# Linking your PlanViewer accounts

## STEP 5

You will get confirmation your Master Account has been created.

### Link accounts - Master account confirmation

This is to confirm your changes. Please take a print of this confirmation for your record.

Master Account: C0AC588M

 Print Version

<b>User Name</b>	C0AC588M
<b>Plan Access</b>	FIL Personal Pension Plan Default
	FIL UK Pension Plan
<b>Date Updated</b>	25 Apr 2023

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## STEP 6

Log back in to [planviewer.co.uk](https://planviewer.co.uk) with your Master Account username and password. Please note that the first time you log in, you will be asked if you wish to change your username and password.

### Change your username

Would you like to change your username to something that's easier to remember? You can use your email address if you like.

You can choose to keep your current username, but please note that you won't be able to update it after this point.

If you decide to change your username, you will be asked to change your password, too.

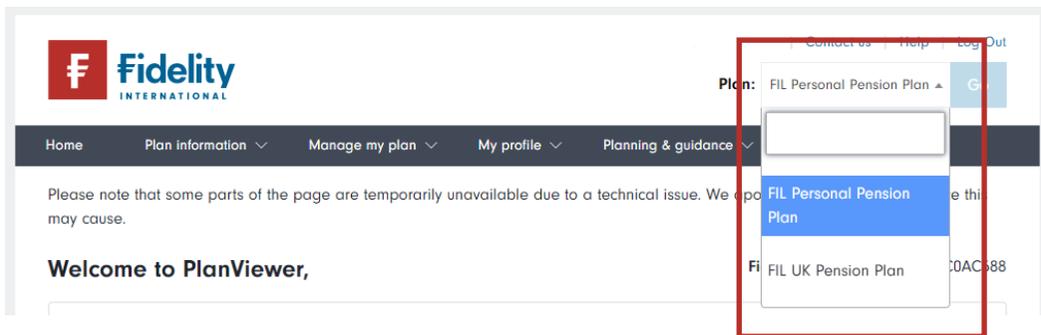
Keep

Change

## Linking your PlanViewer accounts

### STEP 7

Once logged in, you will see your selected default account. To view your other accounts, you can change this in the top-right corner of the page.



Please note, if you have linked multiple accounts, certain features and pages are not accessible via your PlanViewer Master Account login details. This includes communications on the 'My documents' page, transferring another account to Fidelity, changing your Expression of wish beneficiaries or investments. To access these services, please log in to your individual pension account(s) on PlanViewer using the relevant username and password).

For information regarding your pension account, or if you have any further questions regarding linking your accounts, please contact the **Workplace Investing Service Centre** at **pensions.service@fil.com**