



How to register for PlanViewer

This step-by-step guide will help you register for PlanViewer, but before you begin you will need the following:

- ▶ Your Fidelity reference number. (This is seven characters long and starts with a C, M or 5. You can find it on any letter or statement you've received from us.)
- ▶ Your National Insurance number or staff number. (You can find these on your payslip. Your National Insurance number will also appear on a P60 or tax letter.)
- ▶ Access to your personal email account.



Questions about PlanViewer or your pension?

You can contact Fidelity International
Email: pensions.service@fil.com
Telephone: 0800 3 68 68 68

Step 1

Go to www.planviewer.fidelity.co.uk

Select 'Register as a new user'.

Are you new to Fidelity retirement savings account?

Register as a new user

Enter your details.

Please enter your details

Step 1 : Your personal details

Fidelity reference

First name(s)

Last name

Date of birth (DD-MM-YYYY)

National insurance number (XX 45 87 40 X)

I do not have a National Insurance number

Confirm

Click 'Confirm'.

Confirm

Step 2

Create your username and password

Choose a memorable username that's easy to remember, such as your personal email address.

Your password must be at least eight characters long and include three of the following:

- ▶ a lowercase letter
- ▶ an uppercase letter
- ▶ a number
- ▶ or any of these symbols: ! £ \$ * = [] { } @ # ?

Keep your username and password safe as you'll need them to log in to your account.

Please choose a unique username and check that your password meets our requirements. You can update your password in future, but you will not be able to change your username after this point.

Step 2 : Username & password

Username

karish

Please choose a username with at least six characters. You can use your personal email address as your username.

Password

.....

Please choose a password with at least eight characters, containing at least one capital letter, one lowercase letter, one number and one symbol.

Re-enter password

.....

Password strength: Good

Next

Click 'Next'.

Next

Step 3

Set up a one-time passcode

We recommend you use a personal email address rather than your work email address in case you leave the Company or retire.

Set up a one-time passcode

To help keep your account secure, we'll send a one-time passcode via email or text message when you log in from a new device.

Step 3 : One-time passcode

Personal email address

Karishma.Rana@fidelity.co.in

Verify

! Please verify your personal email address...

Mobile phone number (optional)

+44 - GB

Verify

Confirm

Click 'Verify'.

Verify

If you want to verify your mobile phone number (so that you also receive passcodes via text message), please make sure you select the correct international dialling code.

Check your email inbox for a one-time passcode that will come from **Fidelitysecurity@fidelity.co.uk**. Check your spam/junk folder if you can't see it (or request another one if you don't receive it).

Enter the passcode in the pop-up box.

Set up a one-time passcode

To help keep your account secure, we'll send a one-time passcode via email or text message when you log in from a new device.

Verify personal email address

We have just sent a passcode to your email address in order to verify it. Please enter the passcode below.

One-time passcode

188613

Request another code

Confirm

Personal email address

Karishma.Rana@fidelity.co.in

Mobile phone number (optional)

+44 - GB

Verify

Confirm

Click 'Confirm'. This will close the pop-up box and you will return to the set-up page, where you can click 'Confirm' again.

Confirm

And that completes your registration!

Registration completed

Step 4 : Registration complete

Congratulations! You have successfully registered with Fidelity's PlanViewer.

Now you can start managing your retirement savings online.

You can also start using our mobile app by entering your username and password there.

Log in