# **Expression of Wish** Online Electronic Submission Procedure

#### Your guide to submitting your electronic Expression of Wish:

In the event of your death it is very important that your wishes are kept up-to-date so that any potential benefits can be paid out quickly and efficiently to your nominated beneficiaries.

## Step 1:

Log in to PlanViewer using your Username and Password If you have mislaid these details, these can be reset online, please go to https://www.planviewer.fidelity.co.uk/



## Step 2:

This will take you to the homepage where you will see your current balance. Please select 'Manage my plan' from the drop down options and then select 'Update beneficiaries'.

Home Pl	an informo	ation $\checkmark$ Manage i	my plan A My pr	ofile $\vee$ Planning &	k guidance $ arsigma $ Tools & calculators
Change inve	stments			Link accounts	
Update bene	ficiaries				
					As of 16 Apr 2020
					Quick links
Rate of	return	Change in investments	Your last contribution	Employer's last contribution	Use the dropdown below to jump to frequently used sections of the
+0.00	% (i)	£0.00 (i)	£65.50	£234.53	site.
As of 16 A	pr 2020	since 16 Apr 2019	On 28 Oct 2016	On 28 Oct 2016	Quick links 🗸

# Step 3:

■ You will see the options to view/edit current or add new beneficiaries.

ome	Plan informatio	on $ arsigma $ Manage my plan	✓ My profile ✓ Plannin	g & guidance 🗸 🛛 Tc	ools & calculators
Bene	ficiary / Exp	pression of Wish	Form		
The table	below shows previo	ously submitted beneficiary forr	n. You can view a previously submitted	form by clicking on the	
"View De	tails" link.				
Previo	uslv submitted	Beneficiary/Expressi	on form		
	,	,,,,,,,,			
Date Sul	bmitted	Submitted By	Submission Method	Action	
Date Sul	bmitted	Submitted By	Submission Method Online	Action View/Edit	
Date Sul	bmitted	Submitted By	Submission Method Online	Action View/Edit	
Date Sui	bmitted uld like to add a ben	Submitted By	Submission Method Online	Action View/Edit	
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Date Sui	bmitted uld like to add a ben UK by FIL Pensions y the Prudential Reg isurance (Ireland) Li	Submitted By neficiary please click here s Management (FPM) authorise julation Authority and regulated mited (FIL Life Ireland), authori	Submission Method Online ed and regulated by the Financial Cond by the Financial Conduct Authority and sed and regulated by the Central Bank	Action View/Edit uct Authority, FIL Life Insur d the Prudential Regulation of Ireland.	ance Limited (FIL Life) Authority and in Irelar
Date Sui If you wo sued in the thorised by FIL Life In	bmitted uld like to add a ben UK by FIL Pensions y the Prudential Reg Isurance (Ireland) Lii	Submitted By efficiary please click here s Management (FPM) authorise pulation Authority and regulated mited (FIL Life Ireland), authori	Submission Method         Online         ed and regulated by the Financial Cond         by the Financial Conduct Authority and sed and regulated by the Central Bank	Action View/Edit uct Authority, FIL Life Insur d the Prudential Regulation of Ireland.	ance Limited (FIL Life Authority and in Irela

## Step 4:

- Please now add/edit your nominated beneficiaries and ensure all details are correct and that the third party has agreed to their personal details being stored by Fidelity.
- Vou can add as many nominated beneficiaries as you wish but all percentages entered must not have more than one decimal place and the total must add up to 100%.

INTERNATIONA	Y			209 000
			Plan:	
Beneficiary	'Expression of V	Vish Form		
This forms allows you benefits to in the even this form will be treate	to let the pension scheme Tru: t of your death. This form is in d as confidential and you can	stee know which beneficiaries yo respect of your account value in review and update this form onli	ou would like it to consider paying this Scheme only. The information on ne at any time.	
Beneficiary / Express	ion of Wish Form			
Add Beneficiary Cor	firm			
If you navigate awa	y from the online beneficiary	/ form before confirming, any please visit Beneficiary help.	nformation will be lost.	
		····· , ····	* Required	
Name*		Proportion*	%	
	oficiery details			
systems and com Date of Birth	panies including Fidelity*	(DD/MM/YYYY)		
Countrat				
Country"	United Kingdom	<b>₽</b>		
Postcode"	LOOK	tup		
Address Line 1"				
Address Line 2				
Address Line 4				
Address Line 5				
Name*		Proportion*	%	
Indille		горонон		
I confirm that eac systems and com	n nominated beneficiary has ag panies including Fidelity*	greed that their personal data wi	II be processed by third party	
Date of Birth		DD/MM/YYYY)		
Country*	United Kingdom	\$		
Postcode*	Look	<b>kup</b>		
Address Line 1*				
Address Line 2				
Address Line 3				
Address Line 4				
Address Line 5			Remove beneficiary	
Total	100.0 %		Add another beneficiary	
	centages entered must not ha	ve more than one decimal place		

## Step 5:

- Vou will now see a summary of your Expression of Wish selection. Read through everything thoroughly and ensure all details are correct.
- Tick the acknowledgement box.
- Click Submit.

<b>F</b> idelity	Contact us	Help - 군 Log Out	=	
INTERNATIONAL	Plar	1:	✓ Go	
Beneficiary / Expression of Wish Form				
Beneficiary / Expression of Wish Form	吕 Print Version			
Add Beneficiary   Confirm				
Your Personal Details				
Title				
Last Name				
First Name				
Date of Birth				
Employer Number				
Work Email Address				
Beneficiary 1				
News	Edit			
Name				
Date Of Birth				
Proportion				
Country				
Postcode				
Address Line 1				
Address Line 2				
Address Line 3				
Address Line 4				
Address Line 5				
Beneficiary 2				
	Edit			
Name				
Date Of Birth				
Proportion				
Country				
Postcode				
Address Line 2				
Address Line 3				
Address Line 4				
Address Line 5				
I understand that I may change my beneficiary details at any time by comp of Wish form. I understand that this form is intended to assist the Trustees rules of the plan and is not binding on them. I understand that this form will Expression of Wish form I may have completed.	bleting a new Beneficiary / Expression in exercising any discretion under the Il replace any existing Beneficiary /			
Submit				
Note: In the event your designated beneficiary pre-deceases you, if you do Expression of wish form, the value of your account may be paid to your es	o not complete a new Beneficiary/ tate.			

### Step 6:

- Vou will now see the confirmation page with acknowledgment of your submission. You can go back to this electronic form and update the details at any time.
- We recommend you review your Expression of Wish selection at least once a year in addition to any time you have a significant life event such as marriage, divorce and having children.

Plan:	<b>F</b> idelity	Contact us	Help -	=	
Beneficiary / Expression of Wish Form Thank you, your request has been received. Continue usued in the UK by FIL Pensions Management (FPM) authorised and regulated by the Financial Conduct Authority, FIL Life Insurance Limited (FIL Life) uthorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority and in Ireland by FIL fe Insurance (Ireland) Limited (FIL Life Ireland), authorised and regulated by the Central Bank of Ireland.	INTERNATIONAL	Plan:			Go
Thank you, your request has been received.         Continue         ssued in the UK by FIL Pensions Management (FPM) authorised and regulated by the Financial Conduct Authority, FIL Life Insurance Limited (FIL Life)         uthorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority and in Ireland by FIL         ife Insurance (Ireland) Limited (FIL Life Ireland), authorised and regulated by the Central Bank of Ireland.         Ife Insurance Intervention Management	Beneficiary / Expression of Wish Form				
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