

# Stay connected to your pension



Although you're leaving your employer, Fidelity is still here to support you. We'll look after your workplace pension savings for as long as you need us to – and make it easy for you to keep an eye on them. And if you're looking for other ways to grow your money, we can help you get to grips with the world of investing.

## Did you know?



When you leave your employer, you remain a member of your Fidelity pension. The pension savings you've built up continue to be invested as they were when you were an employee.



You continue to have the same investment options available to you – whether that means staying invested in the default strategy for your scheme or selecting your own investment funds.



You'll continue to benefit from Fidelity's investing experience and expertise for your pension, as well as any other products you may hold with us.

Here are **five easy steps** that will help you to keep track of your pension savings invested with Fidelity.

## PlanViewer – your online pension account

You can continue to manage your pension online via PlanViewer.

### Log in and you can:

- Easily track your pension and view its current value
- See what your pension could be worth when you retire and access your annual benefit statements
- Select your investment options

If you haven't registered you'll need your National Insurance number and your Fidelity reference number (you can find this in any letter or statement you've received from us).

Download the app:



Or visit:

[www.planviewer.co.uk](http://www.planviewer.co.uk)

# Log in and manage your pension quickly and easily

## 2 Check your contact details are up to date

- It's important to let us know when your contact details change, as you'll no longer be able to access your work email. Keep your personal contact details (email, phone, address) up to date in PlanViewer.
- Simply go to **'My profile'** then **'Personal information'**.

## 3 Nominate your beneficiaries

- Tell us who you'd like to receive your pension savings when you die. You can nominate up to 20 people or charities.
- Go to **'Manage my plan'** then **'Update beneficiaries'**.

## 4 Check your selected retirement age

- Make sure it reflects your current retirement goals and plans.
- Go to **'My profile'** then **'Personal information'**.

## 5 See where you're invested

- Understand how your pension works and check where you're invested.
- Go to **'Plan overview'**.

## And remember, we're always here

Taking charge of your financial future continues here, and we're ready to support you. You'll benefit from tools, guidance and 24/7 secure online access.

Our aim is to empower you and help you to make sense of the world of investing, while building your pension savings. And you're in good company - Fidelity International is trusted by over 2.8 million customers worldwide\*. Our range of investment solutions and retirement expertise means that from pensions to stocks and shares ISAs, we have our customers covered.

If you need help or have any questions about your pension, you can visit our website [fidelitypensions.co.uk](https://fidelitypensions.co.uk) or call our Workplace Investing Service Centre on **0800 3 68 68 68**, Monday to Friday, 8am to 6pm (UK time).

\*Fidelity as at 30 September 2024 and includes customers from the wider Fidelity group of companies.

**Workplace Investing**

