

# Regular investment service user guide

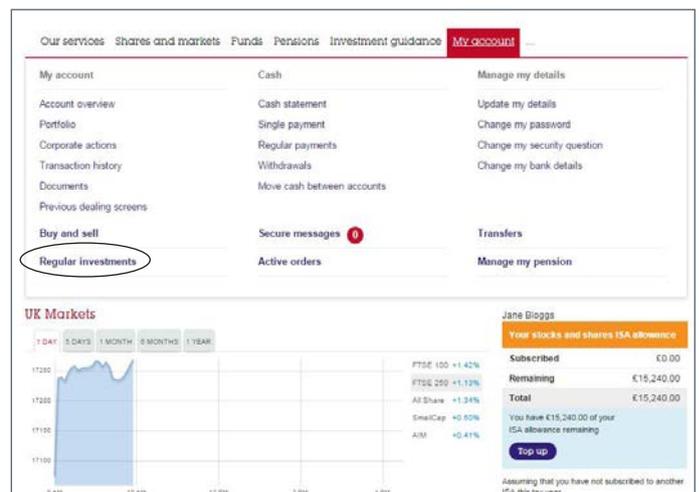
This guide will take you through the steps involved in setting up or amending a regular investment instruction with us.

We hope that you find it useful but if after reading it, you have any further questions, then please call our Dealing services team.

## Setting up a regular investment

### Step 1

Once you have logged into the secure area of AJ Bell Youinvest, go to **“My account”** in the main menu, and then choose the **“Regular investments”** option.

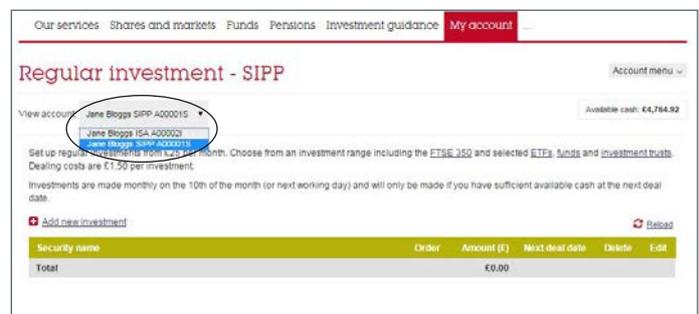


The screenshot shows the 'My account' page with a navigation menu at the top. The 'Regular investments' option is circled in the left-hand menu. Below the menu, there are sections for 'UK Markets' with a line chart and 'Jane Bloggs' with a table of investments.

Security name	Order	Amount (£)	Next deal date	Delete	Edit
<b>Total</b>					
		£0.00			

### Step 2

Next, click on the view account drop down menu and select an account.



The screenshot shows the 'Regular investment - SIPP' page. The 'Jane Bloggs SIPP A000015' account is selected in the dropdown menu. Below the menu, there is a table with columns for 'Security name', 'Order', 'Amount (£)', 'Next deal date', 'Delete', and 'Edit'.

Security name	Order	Amount (£)	Next deal date	Delete	Edit
<b>Total</b>					
		£0.00			

### Step 3

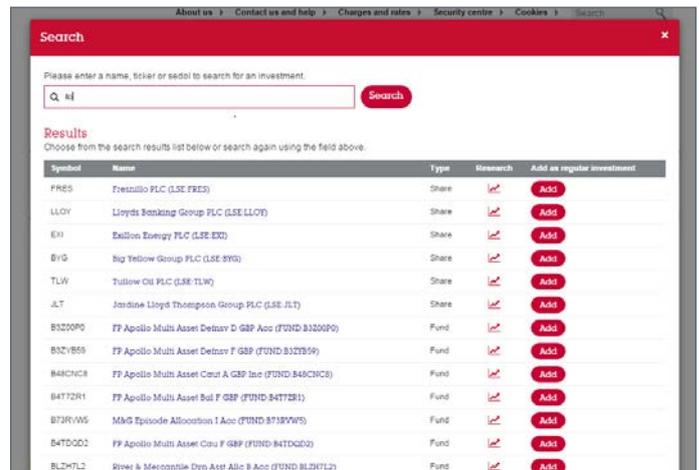
Once you have chosen the account, click “**Add new investment**”. A pop up window will appear.



You can select an investment to regularly invest in by entering its name, ticker or Sedol number.

If you enter just the first two characters of the investment, then a list of options will appear.

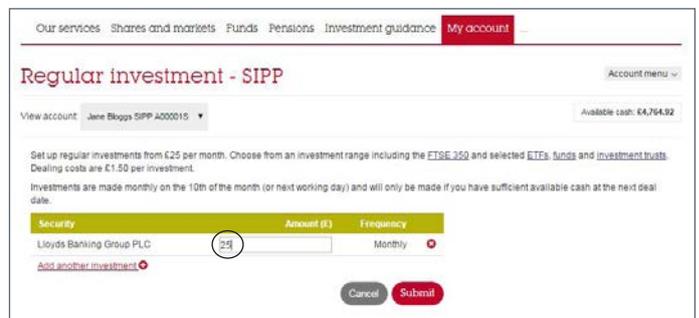
Select an investment of your choice.



### Step 4

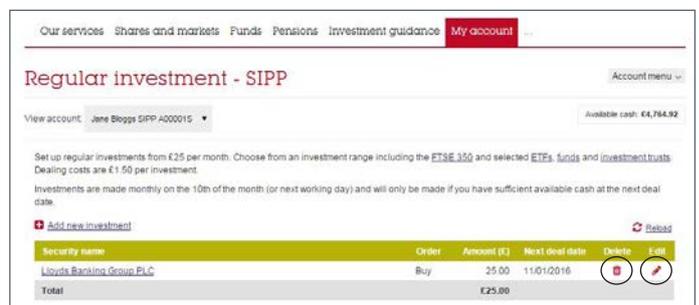
Once you have chosen the investment (in this example Lloyds Banking Group), you can now add the amount you want to invest. Please note that the minimum investment is £25. The frequency of the investment will always be monthly.

When you've entered the amount please click “**Submit**” to confirm your instructions.



### Step 5

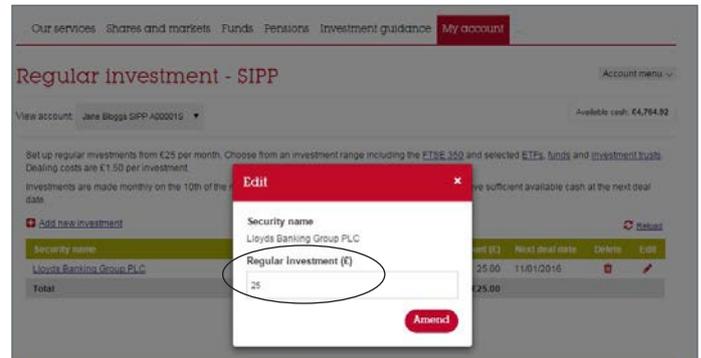
Once your regular investment has been set up, you can always amend or delete your instruction.



## Editing a regular investment

If you wish to edit your instruction please click on the “Edit” icon.

In the pop up window you can change the amount to be invested and then press “Amend”.



## Deleting a regular investment

If you want to delete your instruction please click on the “Delete” icon.

You will be asked to confirm the deletion in a pop up window. If you are happy to delete the regular investment click “Confirm”.

