



**GROUP
& PERSONAL
PENSIONS**

RF Pension Portal Member Guide

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DASHBOARD

The member dashboard contains:

- The member's name
- UPI
- Graph of all plans' combined balance. The member can click their cursor along the blue line within the grid to see previous month-end values
- List of each plan and their corresponding fund balance and plan status. Selecting View Plan will automatically bring the member to the Pension Plan page
- Latest contributions in all plans
- Latest uploaded documents

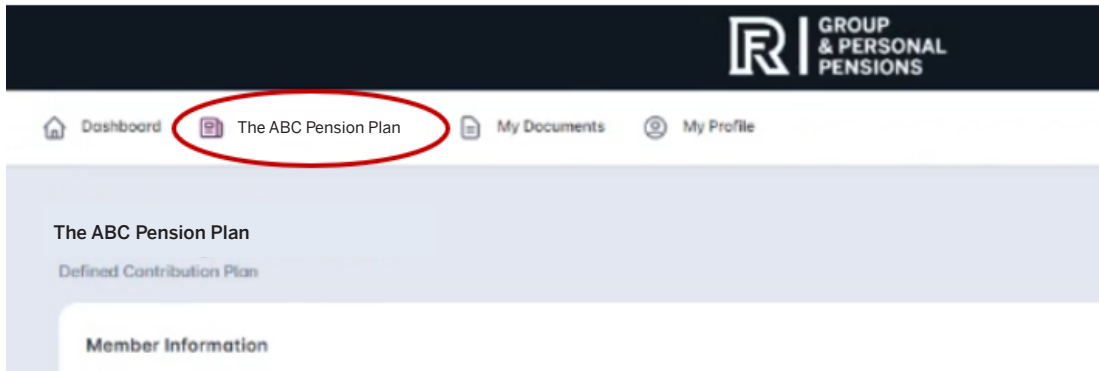
The screenshot displays the 'The ABC Pension Plan Dashboard' for a member named Jane Doe. The dashboard includes a navigation bar with links to Dashboard, The ABC Pension Plan, My Documents, and My Profile. The main content area features a welcome message, the member's identifier (000-000-000), and a 'Plan Balance' section showing an 'All Plans Balance' of \$2,025.38 as of April 24, 2024. Below this is a 'My Plans' section for a 'Defined Contribution Plan' with a fund balance of \$2,025.38 and an 'ACTIVE' status. The 'Latest Contributions (All Plans)' table lists five contributions, and the 'Latest Documents' section shows no documents.

Plan Name	Received Date	Contribution Type	Total Amount (EE + ER)
The ABC Pension Plan	01-Apr-2024	Required	\$260.00
The ABC Pension Plan	31-Jan-2023	Required	\$383.24
The ABC Pension Plan	15-Jan-2023	Required	\$383.24
The ABC Pension Plan	12-Dec-2022	Required	\$383.24
The ABC Pension Plan	21-Nov-2022	Required	\$383.24

PENSION PLAN

To access plan-specific information, select the Pension Plan button to the right of the main Dashboard button.

If the client has more than one pension plan, a Plans tab will appear in which the member can select the plan they wish to view from a drop-down menu.



The members' **Pension Plan** page displays the member's information, summary of the plan balance, summary of the fund balance and allocations, plan details such as contributions, transactions, beneficiaries, and statements.

The screenshot displays the 'The ABC Pension Plan' member portal. At the top, there is a navigation bar with 'Dashboard', 'The ABC Pension Plan', 'My Documents', and 'My Profile'. The main content area is titled 'The ABC Pension Plan' and includes a 'Member Information' card with details such as Plan Name, Status (ACTIVE), Status Date, Plan Type, Employment Start Date, Plan Entry Date, and Plan Sponsor. Below this is a 'Plan Balance' card showing a balance of \$2,025.38 as of April 24, 2024, with a blue line graph representing the balance history. The 'Fund Balance' section contains a table with columns for Fund Name, Fund Type, Current Value, Units, and Unit Value. The table lists 'ABC Pension Fund' with a current value of \$2,025.38 and 100.7508 units. At the bottom, there are tabs for 'Contributions', 'Transactions', 'Beneficiaries', and 'Statements', with 'Statements' currently selected, showing 'No statements'.

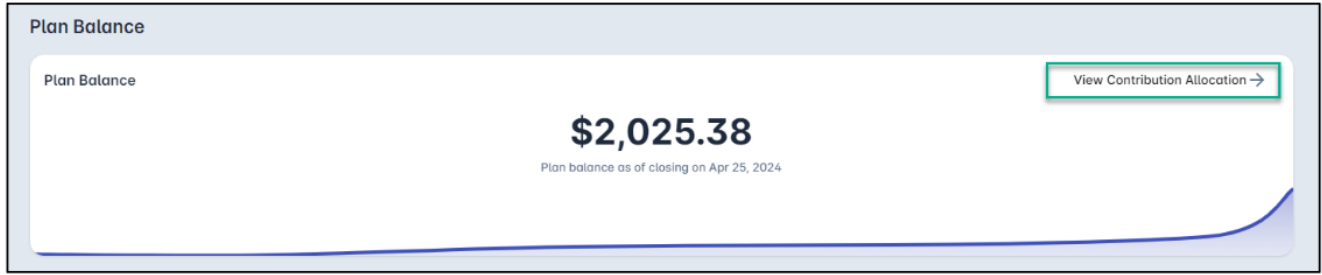
Note: Members can click along the blue line within the Plan Balances card to see previous month end values.

Member Information

The Member Information card displays member information such as employment start date, status in plan, plan entry date, status date, and plan type.

Plan Balance

The Plan Balance card displays a graphical representation of the member's plan balance and amount.



To view Contribution Allocation, select the View Contribution Allocation button within the Plan Balance card. This will display the contribution allocation breakdown and funds.



Fund Balance

The Fund Balance card displays the fund name, fund type, current value, units, and unit values as of the date noted in the top right-hand corner of the Fund Balance section.



Plan Details

The Plan Details card displays separate tabs with information on Contributions, Transactions, Beneficiaries, and Statements for the specific plan for the member.

Plan Details

Contributions Transactions Beneficiaries Statements

Contributions

Received Date ↓	Effective Date	Contribution Type	Member Amount	Employer Amount
01-Apr-2024	02-Apr-2024	Required	\$130.00	\$130.00
31-Jan-2023	31-Jan-2023	Required	\$191.62	\$191.62
13-Jan-2023	31-Dec-2022	Required	\$191.62	\$191.62
12-Dec-2022	31-Oct-2022	Required	\$191.62	\$191.62
21-Nov-2022	31-Oct-2022	Required	\$191.62	\$191.62
Total			\$896.48	\$896.48

Items per page: 10 1 - 5 of 5 |< < > >|

The Contributions tab shows details of the latest contributions. The default amount shown per page is 10, but the amount may be increased to 20, 50 or 100.

Plan Details

Contributions Transactions Beneficiaries Statements

Contributions

Received Date ↓	Effective Date	Contribution Type	Member Amount	Employer Amount
31-Jan-2013	31-Jan-2013	Required	\$111.43	\$111.42
31-Dec-2012	31-Dec-2012	Required	\$163.43	\$163.43
Total			\$274.86	\$274.85

Items per page: 10 1 - 2 of 2 |< < > >|

The Transactions tab shows the latest transactions (contributions as well as other types of transactions). The default amount shown per page is 10, but the amount may be increased to 20, 50, or 100.

Plan Details

Contributions Transactions Beneficiaries Statements

Transactions

Deposit Date ↓	Transaction Type	Fund Name	Member Units	Member Amount	Employer Units	Employer Amount
01-Feb-2013	Deposit	The ABC Pension Fund	7.9330	\$111.43	7.9323	\$111.42
01-Jan-2013	Deposit	The ABC Pension Fund	11.9874	\$163.43	11.9874	\$163.43
Total			19.9204	\$274.86	19.9197	\$274.85

Items per page: 10 1 - 2 of 2 << < > >>

The Beneficiaries tab shows:

- The assigned beneficiaries for the pension plan
- The beneficiaries' relationship to the pension owner
- Disbursement percentage split
- Whether or not the beneficiary is a minor

Plan Details

Contributions Transactions Beneficiaries Statements

Beneficiaries Effective as of Dec 3, 2012

Beneficiary Name	Relationship	Percentage	Minor
Jean Doe	Mother	50%	No
Jan Doe	Sister	50%	No

The Statements tab shows previous statements for the pension plan.

Plan Details

Contributions Transactions Beneficiaries Statements

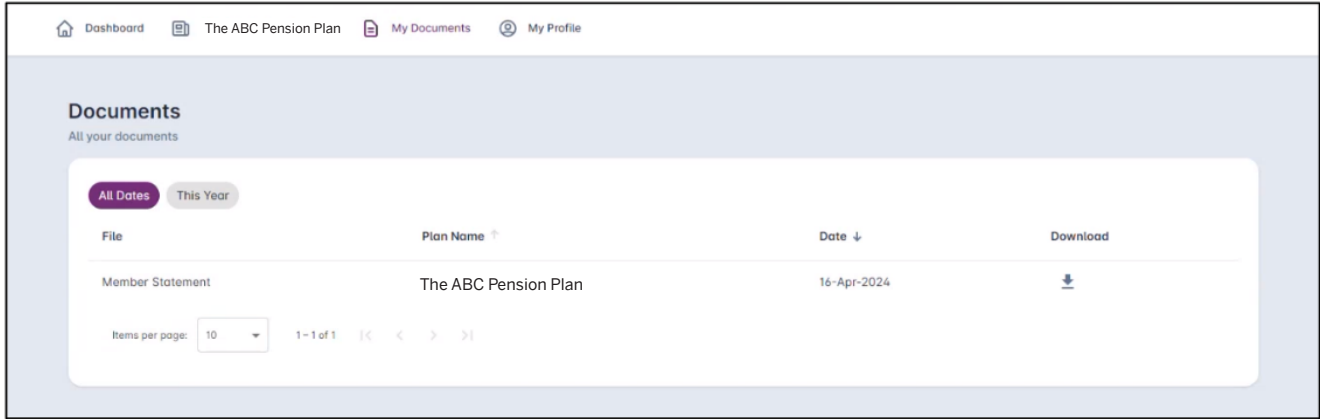
Statements

No statements

MY DOCUMENTS


Documents uploaded for the member by the plan administrator or employer can be viewed within the My Documents page. Types of documents include statements and allocation reports.

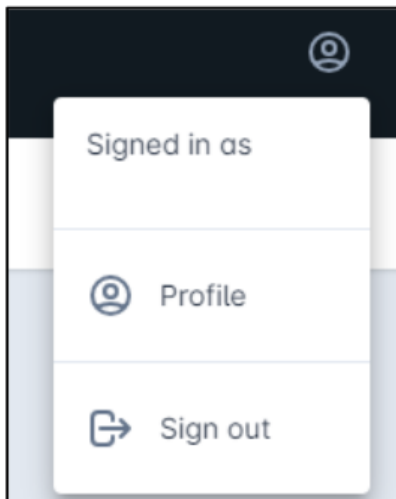
Files can also be downloaded from this area to be viewed on a PC.



MY PROFILE

The My Profile tab may be selected from the top header of the page to see member profile details.

This page may also be accessed by clicking on the  icon in the upper right corner of the webpage.



The Member Profile page is split into 3 sections:

- Profile
- Employment
- Account

The Profile tab includes the following information:

- Member ID
- Name, Gender, Birthday
- Address
- Contact information


PROFILE TAB

The screenshot displays the 'Member Profile' page with a sidebar on the left containing 'Profile', 'Employment', and 'Account' tabs. The main content area is titled 'Profile' and includes the following sections:

- Member ID:** 000-000-000
- Personal Information:**
 - Name: John Doe
 - Gender: Male
 - Birthday: Jan 1, 1980
 - Marital Status: Single
- Address:** Test Lane, 123 Test, Canada, Canada. Includes edit and delete icons for each line and an '+ Add Address' button.
- Contact Information:** John.doe@email.com. Includes edit and delete icons and an 'Add Contact Information' button.

Within the Profile tab, the address and contact information can be updated or deleted.

Updating a Member's Address

1. Within the address section of the page, select the edit button  to open the Edit Address dialog box.
2. Enter the updated address information.

Edit Address
Edit an existing address

Address*

Address 2

City*

Island Zip Code

Grand Cayman

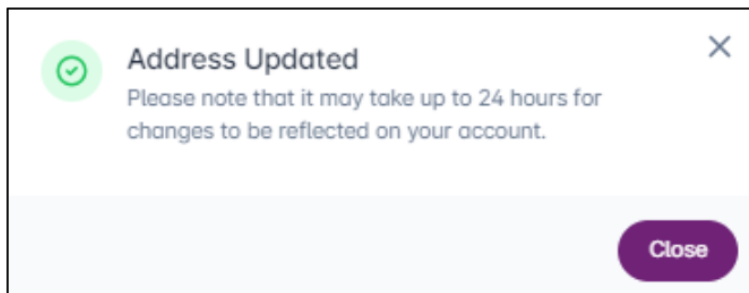
Country*

Cayman Islands

Primary Address

Cancel Update

3. Press the Update button to save the information.



Note: Address changes may take up to 24 hours to reflect in the pension portal.

Adding an Additional Address

1. Click the **+ Add Address** button to add another address.

Address

+ Add Address

📍 Test Lane

📍 123 Test, Canada

📍 Canada

2. Enter the new address information, then click Add.

Add Address

Add a new address

Address*

Address 2

City*

State

Zip Code

Country*

Primary Address

Cancel

Note: Address changes may take up to 24 hours to reflect in the pension portal.

Deleting an Address

Addresses can be deleted by clicking the delete button .

Updating Contact Information

1. Within the contact information section of the page, select the edit button  to update the contact information.

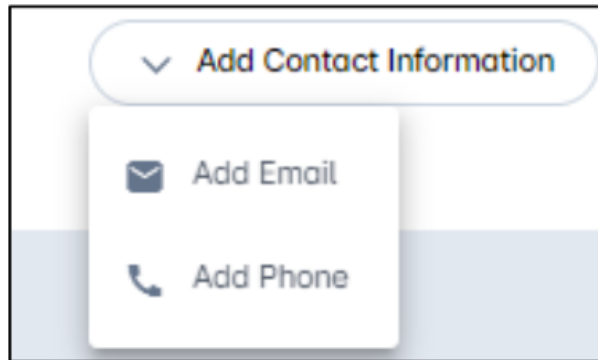
Contact Information Add Contact Information

Contact Person* Contact Details* ✓ ✕

2. Input the updated information.
3. Press the checkmark to confirm the update.

Adding Contact Information

1. In the Address section of the page, select the Add Contact Information drop-down.



2. Enter the new contact information in the corresponding fields (email or phone).

Contact Information Add Contact Information

Contact Person* Contact Details* ✓ ✕

Jane Doe Jane.doe@email.com • Personal ✎ 🗑

3. Press the checkmark to confirm the update.

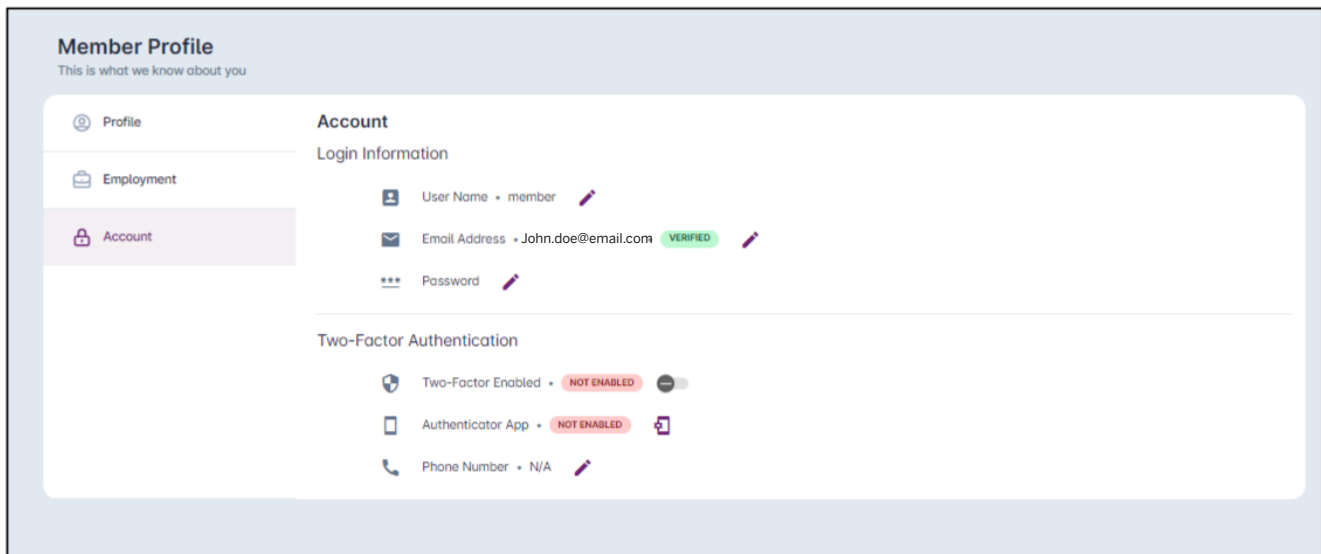
EMPLOYMENT TAB

Member employment information and status is displayed within the Employment tab of the Member Profile page.



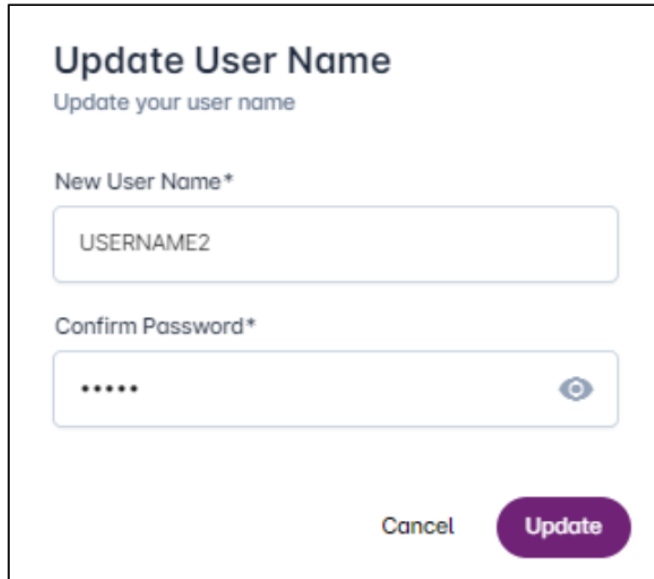
ACCOUNT TAB

The Account tab of the Member Profile page contains the web login information. This tab also includes functions to update the username, email address, password, and two-factor authentication.



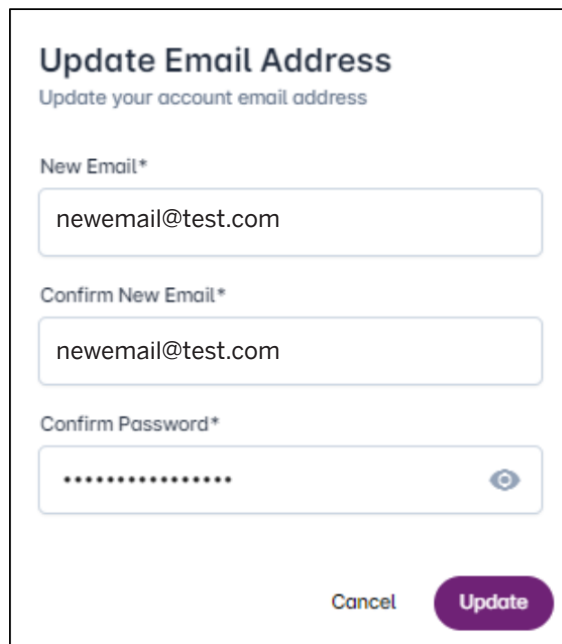
Updating Username

To update the username, select the edit button beside username and enter the updated information.



Updating Email Address

To update the email address, select the edit button  beside the email address and enter the updated information.



Update Password

To update the email address, select the edit button  beside the email address and enter the updated information.

Note: Passwords must have the following features:

- At least 8 characters
- At least one alphanumeric character
- At least one non-alphanumeric character
- At least one digit (0-9)
- At least one upper case letter

Update Password
Update the password for your account

Current Password*

.....

New Password*

.....

Confirm New Password*

.....

Passwords must match

Cancel Update

Two Factor Authentication

Two Factor Authentication can be enabled by clicking the switch button and then following the instructions in the on-screen prompts.

Note: Two-factor authentication cannot be disabled.



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