

## Getting Started with PensionEdge® Plus

This guide is designed to provide you with a quick understanding of the many features of the PensionEdge® Plus portal. The portal allows you fast, convenient access to information 24 hours a day, 7 days a week.



Each page in this guide corresponds to a different screen in the portal, making it easy for you to navigate the system and learn its features. By understanding all of the features of this tool, you will be better equipped to assess your pension benefits.

PensionEdge® Plus is constantly evolving to best serve your needs. As a result, the images in this guide may not appear exactly as shown on your screen.

**The PensionEdge® Service Center is ready to assist you.**



*Representatives are available  
Monday through Friday,  
8:30 am to 4:30 pm ET to  
answer your questions.  
Multilingual services available.*

**Toll-free: 1.866.495.3548**

*Voice response system is available  
at all times, including nights  
and weekends.*



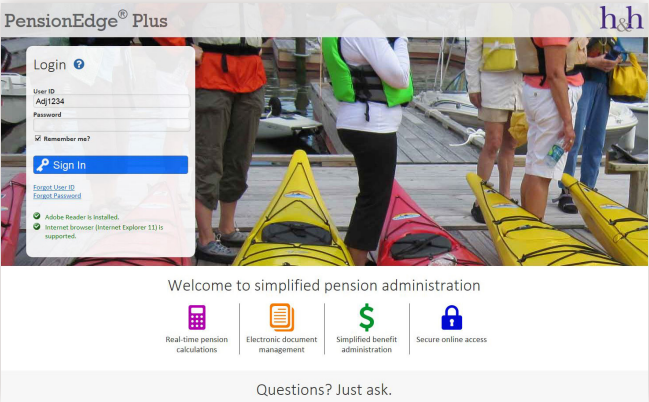
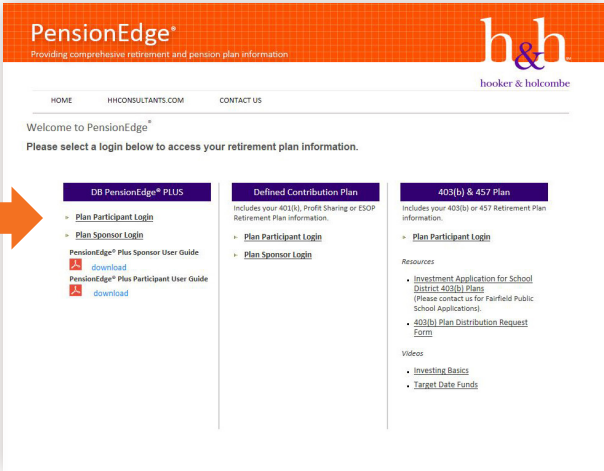
**ServiceCenter@PensionEdge.com**  
*Please note your company name  
when sending us an email message.*

What It Does

The home page is the first screen to appear when you visit PensionEdge.com

How to Use It

Select **Participant Login** under PensionEdge® Plus to access the login screen.

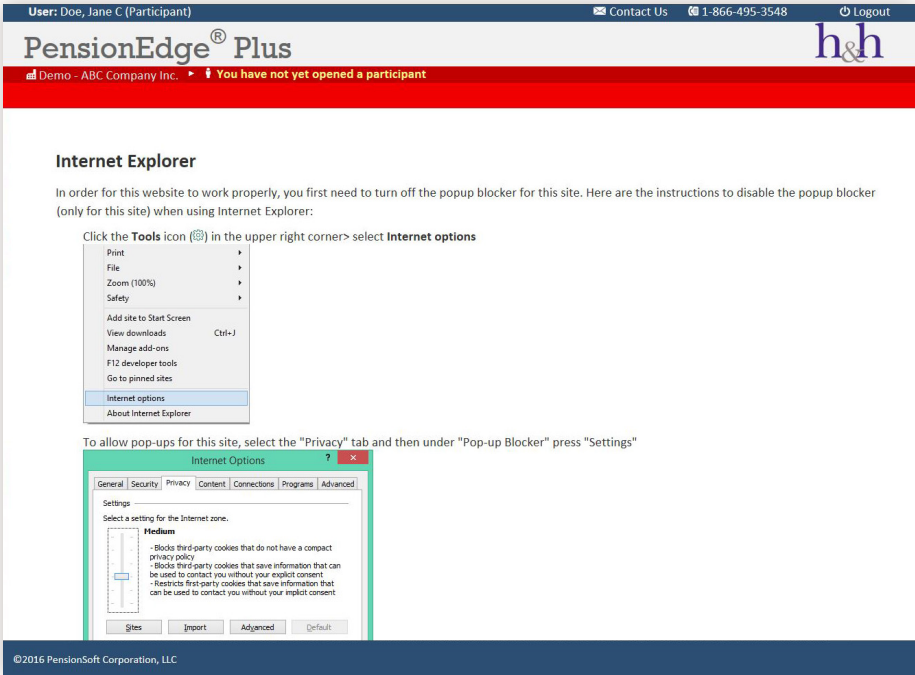


◀ Please note that background image on Login page changes daily.

Temporary passwords are issued to all users. Enter your User ID and temporary Password to login to your plan data. After first login you are required to set up a permanent password. The system will request an email address and answers for security questions.

After initial set up, you may choose **Forgot User ID** and **Forgot Password** links to receive email with reset instructions.

# Pop-up Blocker



## What It Does

Documents may be provided through a pop-up window, so you will need to enable pop-ups to use this system. The screen above will appear if pop-ups are being blocked for this website.

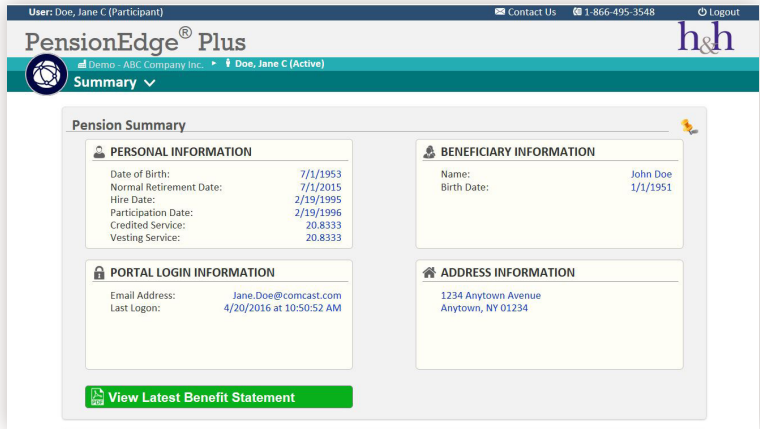
## How to Use It

If pop-ups are being blocked, instructions will be provided on how to allow them. Once pop-ups are enabled on your computer, this screen will not appear again.

# Summary Page

## What It Does

The Summary page is the first screen you will see after login. It displays your individual information and important messages.

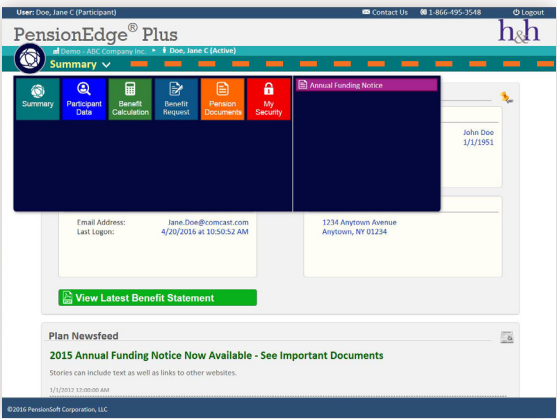


## How to Use It

When the page opens, you will see **Pension Summary information** and **Plan Newsfeed**:

**Pension Summary** — provides your basic information and may include a link to your benefits statement

**Plan Newsfeed** — displays messages that have been posted for viewing by the plan sponsor.



Click the dropdown arrow to reveal the **Quick Link Icons** at anytime during your session.

**Quick Link Icons** — allow easy access to portal functions such as Participant Data, Benefit Calculation, Benefit Request, Pension Documents, Document Upload, My Security, etc.

# Participant Data

User: Doe, Jane C (Participant)Contact Us1-866-495-3548Logout

PensionEdge® Plus

h&h

Demo - ABC Company Inc. ▶ Doe, Jane C (Active)

Participant Data ▼Basic DataBeneficiaryAddressBankWithholdingDatesAmounts

←

Participant Name

First Name:Jane

Middle Name/Initial:C

Last Name:Doe

?

→

Other Information

Date of Birth:7/1/1953

Gender:☐ Male☒ Female

Comment:

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## QUICK LINK



## What It Does

Allows you to view, edit and update data.

## How to Use It

Select **Participant Data**. You can scroll through the available data by clicking the left and right arrows on the data screen. The blue menu bar located above the data may also be used to navigate to each screen (i.e., Basic Data, Beneficiary, Dates, etc.).

Some PensionEdge® Plus features are not available to all users. If data for a particular screen can be edited, an **Update** button will appear in the bottom-right corner. Once your changes have been made, click the **Update** button to save.

# Benefit Calculation

User: Doe, Jane C (Participant)Contact Us1-866-495-3548Logout

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Calculator icon

Demo - ABC Company Inc. ▶ Doe, Jane C (Active)

Benefit Calculation ▼

What type of calculation would you like to complete?

Select from the following:Retirement Illustration

What is your actual or expected last day of employment?

Termination Age/Date:☐ Fixed Age ☐ Fixed Date mm/dd/yyyy

When do you want to begin receiving pension benefits?

Pension Start Age/Date:☐ Fixed Age ☐ Fixed Date mm/dd/yyyy

If contributing to a Defined Contribution plan, please provide the following:

Employee Contribution (% of pay): X.XX %

Latest Account Balance:  as of mm/dd/yyyy

Who do you plan to designate as your beneficiary, where applicable?

Relationship to you:SpouseDate of Birth: 1/1/1951

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Calculate

## QUICK LINK



## What It Does

Allows you to estimate benefit scenarios such as terminations, benefit payment start dates, projections and more using real or estimated dates. Availability of this option is determined by your plan sponsor. Check with your plan sponsor if this feature is disabled.

## How to Use It

Select **Benefit Calculation** to perform estimated benefit calculations. Answer the questions on the screen and click the **Calculate** button located at the bottom right of the screen. A separate window will display calculation results that can be printed and saved. All calculations will require you to provide a termination date (estimated or actual) as well as a benefit payment start date.

# Benefit Request

User: Doe, Jane C (Participant)Contact Us1-866-495-3548Logout

PensionEdge® Plush&h

Demo - ABC Company Inc. Doe, Jane C (Active)

Benefit Request

What is your actual or expected last day of employment?

Termination Age/Date:

☐ Fixed Age

☒ Fixed Date

mm/dd/yyyy

When do you want to begin receiving pension benefits?

Pension Start Age/Date:

☐ Fixed Age

☒ Fixed Date

mm/dd/yyyy

Marital Status/Beneficiary Information

Are you married?

☒ Yes

☐ No

Spouse Date of Birth:

1/1/1951

Use non-spousal beneficiary?

☐ Yes

☒ No

Alternate Beneficiary Date of Birth:

mm/dd/yyyy

Alternate Beneficiary Type:

Ex-spouse

Mailing Address

Street Address:

1234 Anytown Avenue

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Request

## QUICK LINK



## What It Does

Allows you to request a final pension benefit election forms package. Availability for this option is determined by your plan sponsor. Check with your plan sponsor if this feature is disabled.

## How to Use It

Select **Benefit Request**. Answer the questions on the screen and click the **Request** button in the bottom right corner to initiate the final benefit calculation package. This option is for participants who are ready to begin receiving their retirement benefits.



# Pension Documents

User: Doe, Jane C (Participant)Contact Us1-866-495-3548Logout

PensionEdge® Plus

Demo - ABC Company Inc. ▶ Doe, Jane C (Active)

Pension Documents

Participant Documents

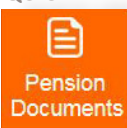
Description	Date	Type	Access
01/01/2016 Benefit Statement	04/13/2016 02:13 PM	Benefit Statement	
01/01/2015 Benefit Statement	06/05/2015 10:31 AM	Benefit Statement	
01/01/2014 Benefit Statement	08/06/2014 11:13 AM	Benefit Statement	

Company Documents

No document results to display

Note: documents uploaded after you logged in to the portal might not appear above.

## QUICK LINK



User: Doe, Jane C (Participant)Contact Us1-866-495-3548Logout

PensionEdge® Plus

Demo - ABC Company Inc. ▶ Doe, Jane C (Active)

Pension Documents

SummaryParticipant DataBenefit CalculationBenefit RequestPension DocumentsDocument UploadAnnual Funding Notice

My Security

Participant Documents

Description	Date	Type	Access
01/01/2016 Benefit Statement	04/13/2016 02:13 PM	Benefit Statement	
01/01/2015 Benefit Statement	06/05/2015 10:31 AM	Benefit Statement	
01/01/2014 Benefit Statement	08/06/2014 11:13 AM	Benefit Statement	

Quick Access

## What It Does

Allows your pension-related documents to be securely stored and retrieved online. This feature allows you to retrieve and view documents such as Annual Funding Notices and Plan Summary.

## How to Use It

Use this tool to view commonly opened documents or to access archived documents. By double clicking on the document line, it can be opened or saved to your computer. The access column indicates whether a document is accessible by the Participant, Plan Sponsor or both.

## \*Quick Access

The most commonly opened documents generally appear as options to the right of the icons in the Quick Links dropdown menu.

# Document Upload

User: Doe, Jane C (Participant)Contact Us1-866-495-3548Logout

PensionEdge® Plush&h

Demo - ABC Company Inc. ▾Doe, Jane C (Active)

Document Upload ▾

Document Information?

File to Upload:  Browse...

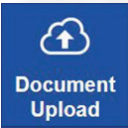
Document Type: Unknown/Other ▾

Document Access: ☒ Sponsor Contacts ☐ Participant

Description:

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## QUICK LINK



## What It Does

You may upload documents to the archive for easy retrieval when needed. For your security, the system automatically checks documents for viruses and notifies you if an infected document cannot be loaded to the archive. Availability of this feature is determined by your plan sponsor. Check with your plan sponsor if this feature is disabled.

## How to Use It

Choose **Documents** and **Document Upload** to upload documents to the secure server. Documents can be saved as PDF, Microsoft Excel or Word, comma delimited or text formats. Select **Upload** to add the document to the archive. Select **Cancel** to void the upload.

# My Security

The screenshot shows the 'My Security' page within the PensionEdge Plus application. At the top, a dark blue header bar contains the text 'User: Doe, Jane C (Participant)', 'Contact Us', '1-866-495-3548', and 'Logout'. Below this is a red navigation bar with the 'PensionEdge Plus' logo on the left, a user profile icon and name 'Doe, Jane C (Active)' in the center, and links for 'Email Address', 'Change Password', and 'Security Question' on the right. The main content area is titled 'Current/New Email Address' and features three input fields: 'Current Email Address', 'New Email Address', and 'Re-enter Email Address'. Navigation arrows are visible on the left and right sides of the main content area. At the bottom, a dark blue footer bar displays '© 2016 PensionSoft Corporation, LLC' and two buttons: a green 'Update' button and an orange 'Cancel' button.

## QUICK LINK



*Security is a key component of PensionEdge® Plus. Your Plan Sponsor determines password configurations such as minimum length, certain characters, or upper/lower restrictions. You can enter your e-mail address and answer the security question(s) to retrieve your forgotten User ID and password.*

### What It Does

Allows you to reset your password, change your email or update your security questions.

### How to Use It

Select **My Security**. Use the left and right arrows to scroll through all three screens. The red menu bar located above the data may also be used to navigate to each screen (i.e., Email Address, Change Password or Security Question). Select **Update** to save your changes. Select **Cancel** to void the change.

## About Hooker & Holcombe

Hooker & Holcombe opened its doors in 1956 as a full-service pension and actuarial consulting firm. Over the years, the firm has expanded its services to include comprehensive, integrated consulting and investment advisory services for all types of employer-sponsored retirement plans. In addition, wealth management services are available to individuals seeking customized financial planning services. Hooker & Holcombe's reputation for integrity, combined with its ability to deliver outstanding professional services, has made it one of the premier actuarial, retirement services and investment advisory firms in the Northeast. For more information, visit [hhconsultants.com](http://hhconsultants.com).



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