

# Pension Planet Interactive

## A new world of pensions online



### User Guide for Members



#### The following guide explains:

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Log on now!

[www.pensionplanetinteractive.ie](http://www.pensionplanetinteractive.ie)





# How to register



The following 3 easy steps explain how to register for Pension Planet Interactive.

## STEP 1

### Get a Registration Code

If you are a new member of the pension plan you will have received your Registration Code. You may have received your registration code by email, SMS or letter from Irish Life.

Alternatively, log onto [www.pensionplanetinteractive.ie](http://www.pensionplanetinteractive.ie) and request a Registration Code through the Member Log In screen. You will need to enter your member number and date of birth. Your code will be issued in the post.

## STEP 2

### Registration

Once you have your Registration Code log on to [www.pensionplanetinteractive.ie](http://www.pensionplanetinteractive.ie). Enter your Registration Code, date of birth, as well as your email address and/or your mobile phone number. We will immediately send you a User Name and your password.

## STEP 3

### Set your password

You can now log in. Enter your User Name and password. You will be asked to set up 3 security questions for future reference and you can then change your password. Finally, you must accept the Terms & Conditions.

For future logins you will need to remember your User Name and the new password you generated.



**WARNING:** You should not disclose your User Name or password to anybody, please keep them safe. Irish Life will never send letters or emails requesting your Pension Planet Interactive login details.

# An overview of your pension scheme details



Welcome to Pension Planet Interactive!

The first screen you see when you access the system shows you an overview of important details of your pension plan and provides links to further information.

Use the navigation bar or the quick links to access further details about your account, scheme, transactions, documents and investment funds.

The account summary summarises the contact details we currently hold for you as well as the account details and membership status.

The screenshot displays the Pension Planet Interactive user interface. At the top, there is a navigation bar with the Pension Planet logo and 'Interactive' text. Below this, a header section shows the user's name 'JANE M. SMITH' and a 'Logout' button. The main content area is divided into several sections:

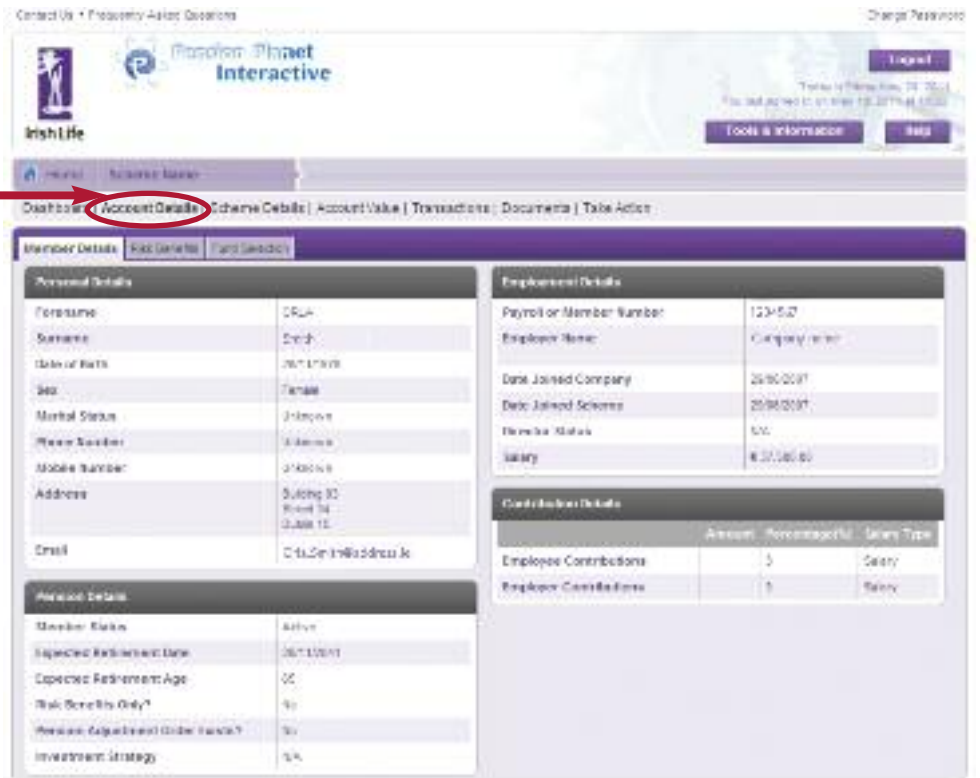
- Account Summary:** A box on the left shows 'You have 1 plan(s)'. Below it, a table lists 'Current Value' as £33,011.40 and 'Total Contributions' as £27,156.99. A 'View Plan' button is also present.
- Investment Funds:** A table on the right lists various funds and their values:

Investment Fund	Value
Pension Funds Series 1	£7,018.10
Pension Fund Global Assets 2	£5,881.27
Pension Property Assets 2	£5,014.88
Pension Equity Fund	£1,275.76
GLOBAL PERFORMANCE FUND	£9,821.02
<b>Current Value:</b>	<b>£33,011.40</b>
- Time to Retirement:** A section at the bottom right shows '16 YEARS 10 MONTHS' until 'July 2030'.

At the bottom of the page, there are three promotional banners: 'Guide to Pension Planet Interactive' (marked 'COMING SOON'), 'Plan your retirement' with 'Pension Prophet' (a woman's face), and 'Get the Smartphone App!' (showing a smartphone).

# Account Details

In the section called "Account Details" you find information relating to your personal details, your pension details, employment and contributions.



**Personal Details**

Forename	DELA
Surname	DELO
Date of Birth	26/11/1978
Sex	Female
Marital Status	Single
Phone Number	01454 611111
Mobile Number	01454 611111
Address	Bulfinch St Room 34 Dublin 15
Email	DELO@bulfinch.ie

**Employment Details**

Payroll or Member Number	1234567
Employer Name	Company name
Date Joined Company	20/01/2017
Date Joined Scheme	20/01/2017
Member Status	Full
Salary	€ 37,500.00

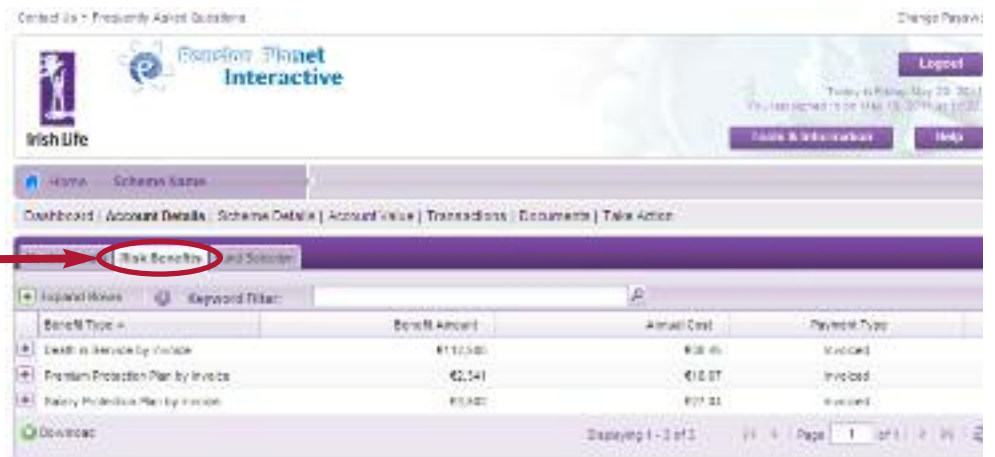
**Pension Details**

Member Status	Active
Expected Retirement Date	26/11/2017
Expected Retirement Age	60
Risk Benefits Only?	No
Retiree Adjustment Order Rank?	No
Investment Strategy	SA

**Contributions Details**

	Amount	Percentage	Salary Type
Employee Contributions	0	0	Salary
Employer Contributions	0	0	Salary

**Risk Benefits**  
If applicable to your scheme, you can also view the risk benefits you are covered for in your scheme.



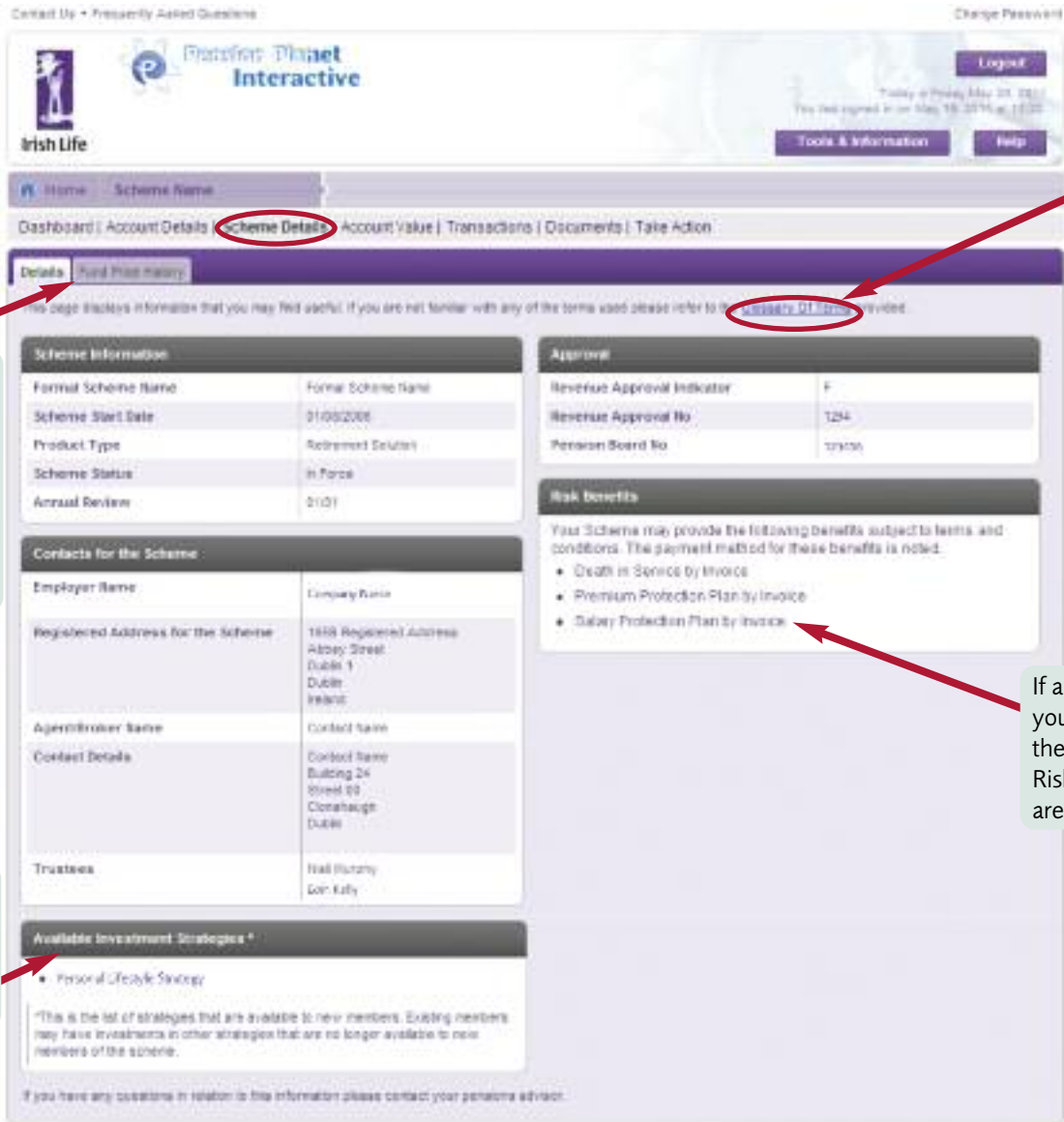
Benefit Type	Benefit Amount	Annual Cost	Payment Type
Death in Service by Invoice	€11,500	€38.46	Involved
Premium Protection Plan by Invoice	€2,141	€18.87	Involved
Salary Protection Plan by Invoice	€1,427	€77.21	Involved

**Fund Selection**  
The section "Fund Selection" tells you which funds you are currently invested in.



Contribution Type	Fund/Strategy	Allocation
Employee Contributions	Conservative Fund	100
Employer Contributions	Conservative Fund	100

# Scheme Details



**Help!**  
We have developed a "Glossary of Terms" to help you with the terms used in Pension Planet Interactive

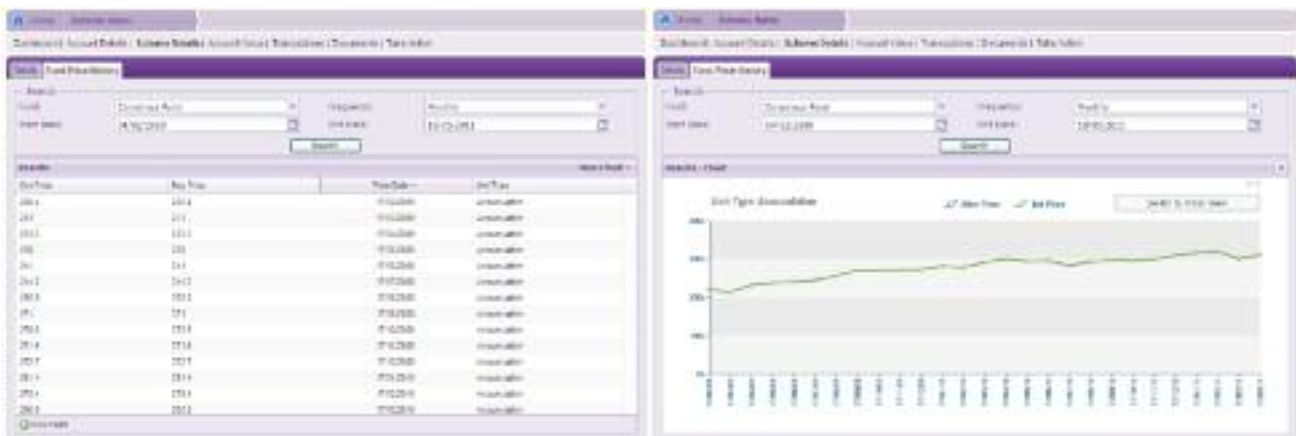
To see how investment funds available in your scheme have performed in the past, check the "Fund Price History".

If your scheme offers an investment strategy, it is listed here.

If applicable to your scheme, the options for Risk Benefits are listed here.

## Fund Price History

In the Fund Price History you can select a fund and a date range to view the development of the fund price over time. You can view the fund performance in a table of prices or in a graph.

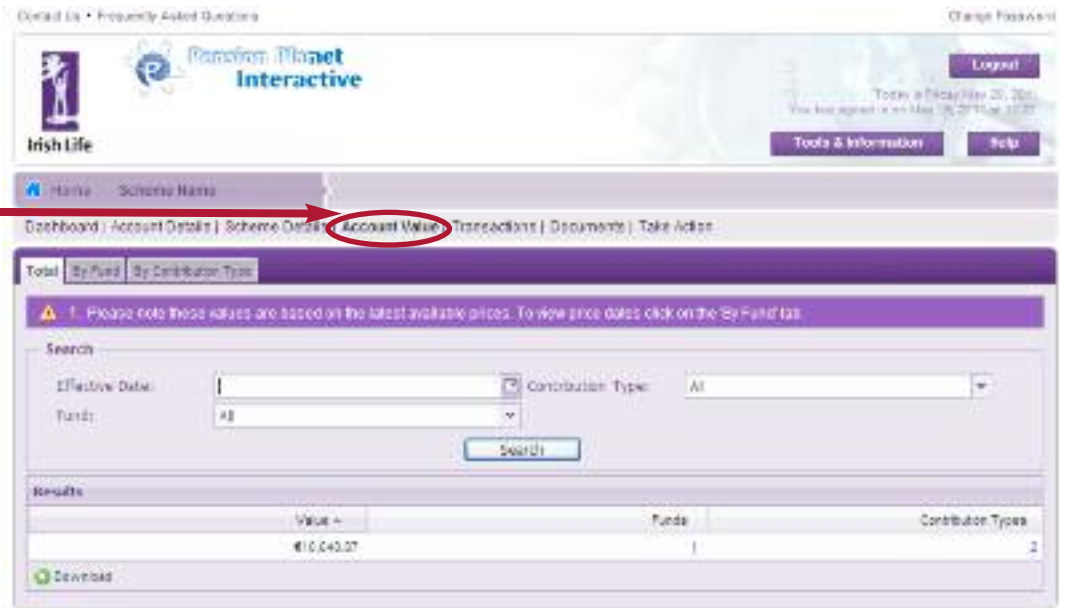




# Account Value

View your account value here for the current date or a date in the past. You can also view the values per contribution type or per fund.

Please note these values are based on the latest available prices. To view price dates click on the 'By Fund' tab.



Dashboard | Account Details | Scheme Details | **Account Value** | Transactions | Documents | Take Action

Total | By Fund | By Contribution Type

⚠ Please note these values are based on the latest available prices. To view price dates click on the 'By Fund' tab.

Search

Effective Date:  Contribution Type: All

Fund: All

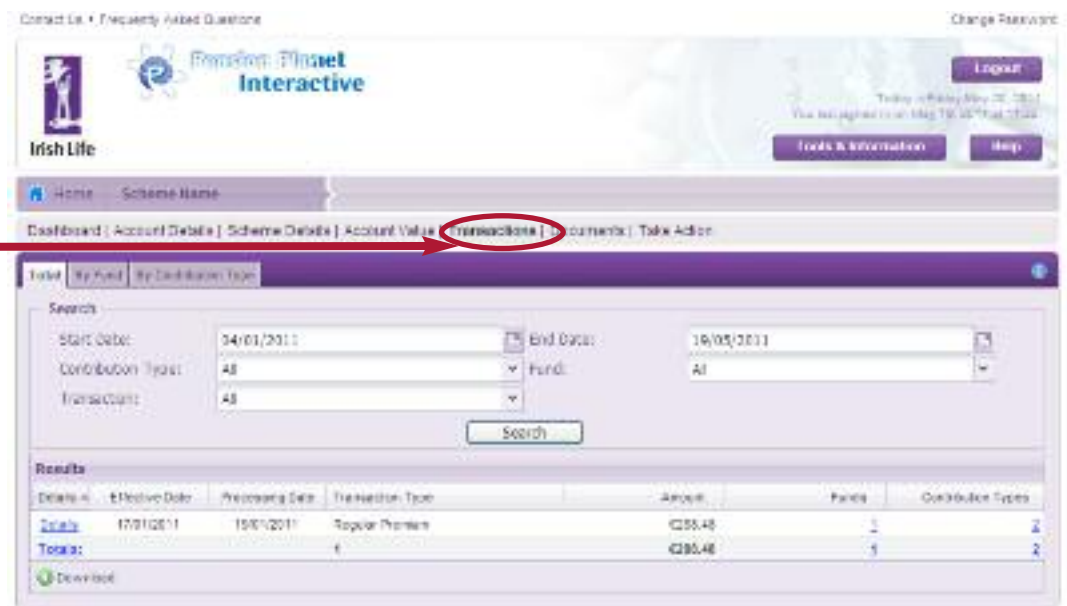
Search

Value	Funds	Contribution Types
€10,040.07	1	2

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# Transactions

You can view transactions over the last 24 months and filter by contribution types, funds and transaction types.



Contact Us | Frequently Asked Questions | Change Password

Irish Life Pension Planet Interactive

Dashboard | Account Details | Scheme Details | Account Value | **Transactions** | Documents | Take Action

Total | By Fund | By Contribution Type

Search

Start Date: 04/01/2011 End Date: 18/05/2011

Contribution Type: All Fund: All

Transaction: All

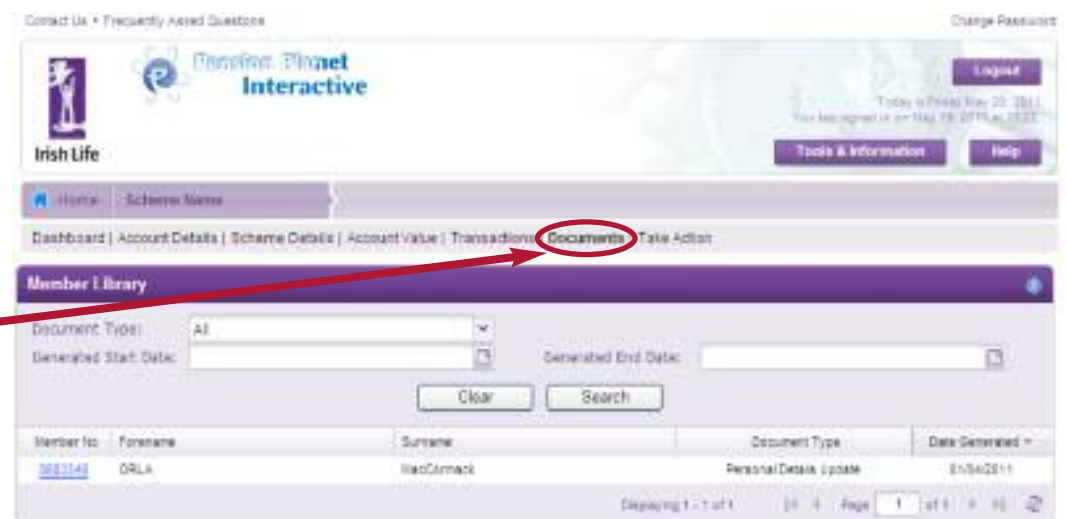
Search

Details	Effective Date	Processing Date	Transaction Type	Amount	Funds	Contribution Types
<a href="#">Details</a>	17/01/2011	18/01/2011	Regular Premium	€285.46	1	2
<b>Total:</b>				€1285.46	1	2

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# Document Library

The Document Library is one of the great new features in Pension Planet Interactive. It shows your recent benefit statements and correspondence items.



Contact Us | Frequently Asked Questions | Change Password

Irish Life Pension Planet Interactive

Dashboard | Account Details | Scheme Details | Account Value | Transactions | **Documents** | Take Action

Member Library

Document Type: All

Generated Start Date:  Generated End Date:

Clear Search

Member No	Forename	Surname	Document Type	Date Generated
<a href="#">0833148</a>	ORLA	MacCormack	Personal Details Update	18/04/2011

Displaying 1 - 1 of 1 | Page 1 of 1

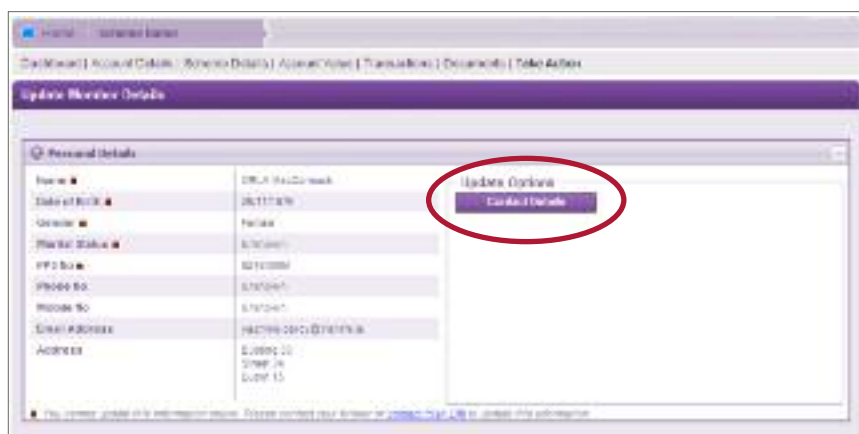
# Updating your contact details

Pension Planet Interactive lets you update your contact details, such as your phone number, mobile number, email address or postal address, directly in the system.

To do so, click on the relevant item in the dashboard screen or go to "Take Action".



To update your contact details, you will be asked to answer a security question first.

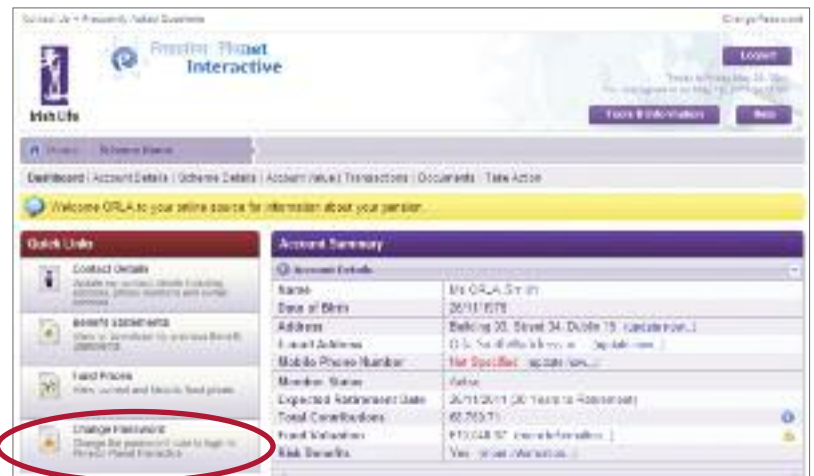




# How to change your password



To change your password click on the quick link in the overview screen or on the link at the top right hand corner of the screen.



## Pension Planet Interactive password policy

Pension Planet Interactive applies password standards to ensure that user's passwords are secure. Any time you change or reset your password, Pension Planet Interactive will show you a visual password strength meter to indicate how secure your new password is.

Insecure passwords are indicated by a red bar on the meter. Partially secure passwords are indicated with an amber bar, with secure passwords illustrated by a green bar.

Your new password needs to be at least 10% secure on the password meter to be accepted by Pension Planet Interactive. If Pension Planet Interactive deems your password insecure, it will not permit you to use it.

You can not use any of your previous passwords again. When you are choosing your password, remember the following guidelines to help you create a very secure password:



### Recommended

- Ensure that your password is at least 8 characters in length
- Use a mix of upper case and lower case characters
- Have a mix of both numbers and letters
- Use symbols such as @, \*, + etc.

### Never

- Repeat the same character in your password e.g.: 'aaaa' or 'ababab'
- Use sequential characters in your password such as '1234' or 'abcd' or '1111'
- Use previous passwords when changing your password
- Choose a password that is based on personal information such as your name, email address or phone number
- Choose a password that is based on your username for accessing the system

**The most secure passwords will contain 3 or 4 of each of the following items:**

- Uppercase Letters
- Lowercase Letters
- Numbers
- Symbols

Pension Planet Interactive also offers extensive tools and information to keep you up to date with pensions and investments.

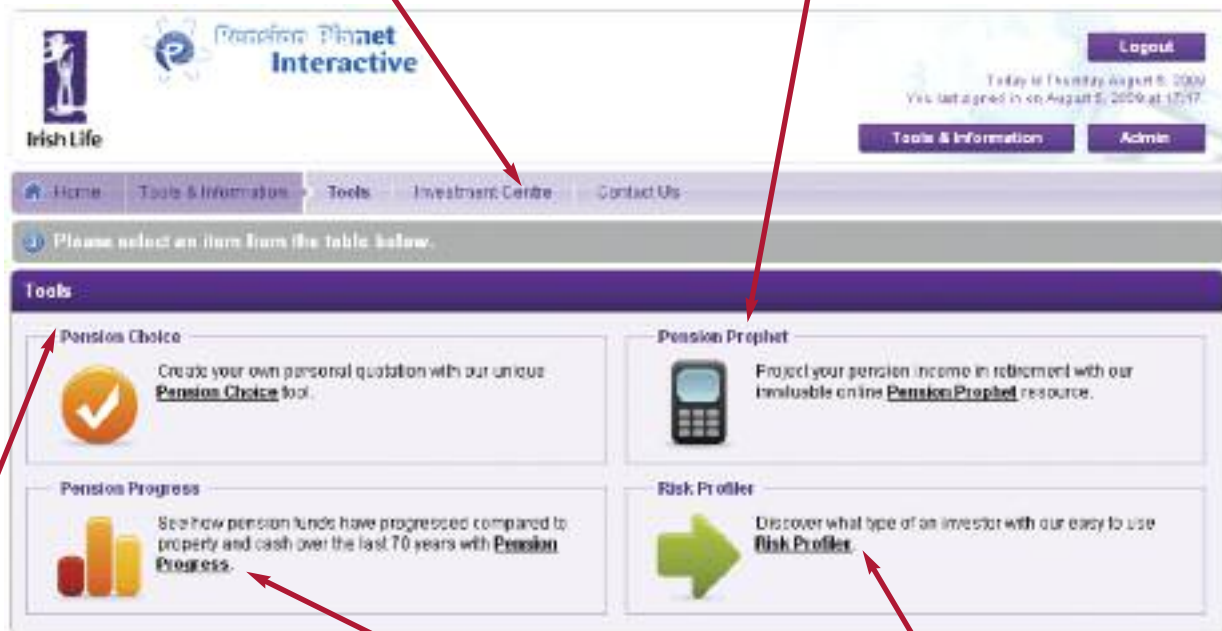
## Investment Centre:

The Investment Centre offers

- weekly and monthly market commentaries
- **monthly** fund factsheets
- Investment Guide with an overview of the funds available from Irish Life Corporate Business
- weekly PRSA fund report

## Pension Prophet

Pension Prophet is an easy to use projection tool to help with financial planning for retirement. Pension Prophet predicts the size of the pension fund you may accumulate at retirement based on current and projected contribution levels, investment returns, income and inflation developments. Projections can be varied to see what effect different contribution amounts and investment periods can have on the fund.



## Pension Choice

Lets you run annuity quotes for our retirement products.

## Pension Progress

See how equities, property, bonds and cash have performed historically.

## Risk profiler

The Risk Profiler determines what type of investor you are in relation to investment risk.



## Contact us

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