

Member portal registration package samples

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My Pension

Member portal now available

Ma pension

Le portail des participants est
maintenant disponible

SAMPLE

[Month year]

[Member Name]
[Member address line 1]
[Member address line 2]
[Member address line 3]

Access your up-to-date pension information on My Pension, the CAAT Plan portal

Your member account on My Pension, the new portal, is ready to use. Follow a few simple steps to activate your account, and see your pension information online.

To activate your account:

Visit www.caatpension.ca and click on Login.

To start, enter your Member ID (shown below), date of birth, and the last three digits of your social insurance number.

Your Member ID: [xxxxxxx]

You'll be asked to confirm your email by entering a one-time use verification code, which you'll receive during the login process. Next, set up your secure password and security questions.

When you log in for the first time, be sure to review your data and set up your personal preferences. Then you'll be all set to access your pension information directly from the CAAT Pension Plan.

My Pension makes it easy for you to plan your retirement – see your most recent pension calculation, and earliest retirement dates whenever you want.

Need assistance?

Our Member Services team is standing by to answer your questions.

Email the hotline at member@caatpension.ca

Or call 1.866.350.2228 (Toronto: 416.673.9000).

My Pension gives you access to your personal pension information

The all new member portal, My Pension, makes it easier to access your personal pension information, any time you want. It's secure and easy to use.

What can I do on My Pension?



Receive your Annual Statement online

Access your Statement any time you want, as soon as it's ready. Plus, all your future Statements and documents will be accessible on My Pension, as they become available.



Manage your contact information easily

It's up to you to keep your contact information current with the CAAT Plan. My Pension makes it easy. Change your address, phone, or email, or update your designated beneficiaries. There's no need to call the Plan or complete a form.



Get an estimate with retirement planning tools

Get an estimate without entering any data - My Pension will automatically populate the fields for you. Plus, estimate different retirement scenarios, and see how a purchase can increase your retirement income.



Secure messages with CAAT

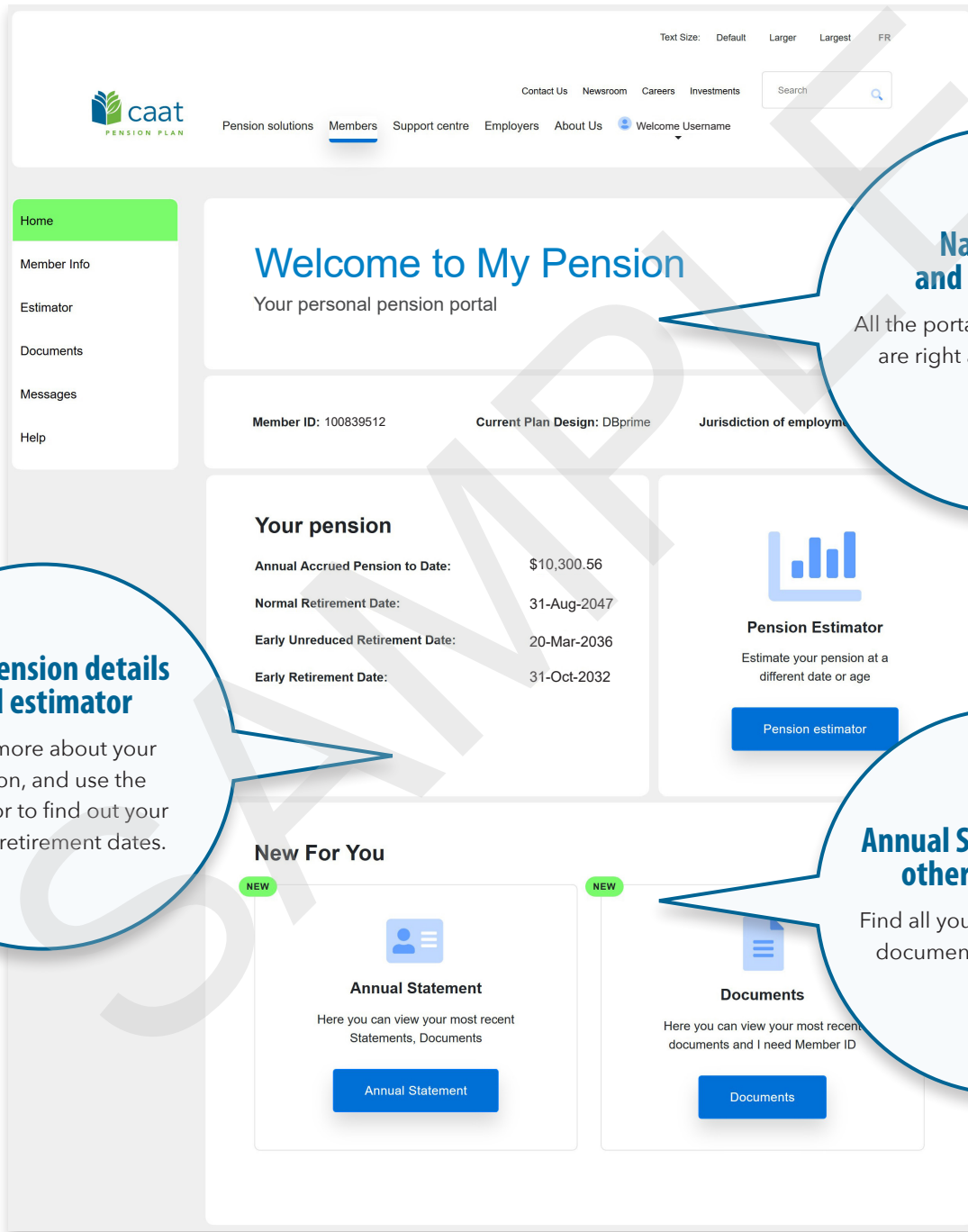
Send and receive secure messages about your pension through the Message Centre.

Over time, the tools and features available on My Pension will continue to evolve. Stay tuned for updates and to learn more about the new ways you can connect with your CAAT pension on My Pension.

My Pension is a secure environment. Only you have access to your account.

A sneak peek at My Pension

Here's your first look at the features and tools available on the new member portal, My Pension.



Navigation and dashboard

All the portal features and tools are right at your fingertips.

Your pension details and estimator

Learn more about your pension, and use the estimator to find out your earliest retirement dates.

Annual Statements and other documents

Find all your personal pension documents here, as they're ready.

Email sample: Portal email for employers to their staff

Subject line:

My Pension: The new member portal from the CAAT Pension Plan

[Employer's personalized greeting]

We are pleased to offer you access to all your personal pension information through the new member portal, My Pension, from the CAAT Pension Plan. We encourage you to explore My Pension and the valuable tools in the portal. It's secure and easy to use.

With My Pension, you can:

- Keep the Plan up to date and easily manage your contact information
- Get a pension estimate, see different retirement scenarios, and learn how a purchase can increase your pension
- Send and receive messages with the Plan through the secure Message Centre
- Get your Annual Statement electronically, as soon as it becomes available: save paper and time

The CAAT Plan will be working to add more tools and features for My Pension over time.

What are the next steps?

Keep an eye on your mail for a letter that will provide you with more information on how to register and log into My Pension.

To receive your 2020 Annual Statement online, and view it anytime, be sure to log in, go to "User Preference Details" and choose "Electronic" as your preferred method of communication.

[Employer's personalized sign-off]