

myCSSPEN at a glance



As a member of the CSS Pension Plan, you can use myCSSPEN to check the value of your account(s), estimate your retirement income, rebalance your investment among the Plan's four investment funds, update your contact information, keep track of any contributions made and more. This guide provides a general overview of the type of information you can see when you're logged in. To register for myCSSPEN, visit www.csspension.com.

1. Portfolio balance

Shows the total value of the pension funds you have invested in the CSS Pension Plan's investment funds.

2. Contribution account

Shows current information regarding the pension contributions you and your employer made to the Plan.

3. Transferred-In account(s)

Displays information for any funds you have transferred into the Plan from external financial sources (e.g. another RPP), according to the applicable provincial or federal jurisdiction.

4. Variable Benefit (VB) account(s)

If you currently receive VB payments, the VB account tab shows you the details of your VB account(s) according to the applicable provincial or federal jurisdiction.

5. Pension account(s)

If you receive a monthly pension, this tab displays account details for your pension account(s), including your monthly payment amount.

6. Fund name/Account or pension number

Shows the investment fund(s) for which you're currently invested. If you're invested in more than one fund, you can toggle between each.

VB recipients: You can also use the "Account Information" toggle to switch the view to display by investment fund or account number.

Monthly pension recipients: Your pension number is displayed here. If you have more than one pension number, you can toggle between each.

The screenshot shows the myCSSPEN interface with the following elements:

- 1. Total Portfolio Balance:** \$229,486.99
- 2. My Accounts:** A tabbed interface with four tabs: CONTRIBUTION, TRANSFERRED-IN, VARIABLE BENEFIT, and PENSION.
- 3. CONTRIBUTION:** Shows current information regarding pension contributions.
- 4. TRANSFERRED-IN:** Shows information for funds transferred into the Plan.
- 5. VARIABLE BENEFIT:** Shows details of Variable Benefit accounts.
- 6. PENSION:** Shows details of pension accounts.
- 7. ACCOUNT INFORMATION:** A section showing Fund Name, Current Fund Value, and Total Account Value.
- 8. MY TRANSACTIONS:** A section showing transaction history.
- 9. ACCOUNT MENU:** A section with links to various account-related functions.
- 10. My Profile:** A section showing personal information such as Member ID, Name, Birthdate, Gender, Beneficiary, and contact details.
- 11. My Documents:** A section showing documents confirming investment instructions.
- 12. UPDATE CONTACT INFORMATION:** A button to update contact information.

7. Current value

Shows the current value of the selected investment fund.

VB recipients: You can also use the "Account Information" toggle to view the account value by account number instead of by investment fund.

Monthly pension recipients: The monthly pension payment amount for the selected pension number is displayed here.

8. Total value

Displays the total account value for the selected account. For monthly pension recipients, the total monthly payment is displayed.

9. My transactions

Shows your transaction history for the selected account, including any contributions made, transfers-in, withdrawals and more.

10. Account menu

Access retirement planning tools, manage your login emails for myCSSPEN, and change your investments, password or security question.

11. My Documents area

Access eDocuments confirming any investment instructions you submit through myCSSPEN. Annual account statements are also available in this area. You can view, print or save your eDocuments at your convenience.

12. Update contact information

The My Profile area displays your personal information currently on file at the Plan. If you need to make changes, select the Update Contact Information link (note: Information changes must be verified by CSS before they will appear in your myCSSPEN profile).

Need to change your login email?

To change your login email, register for myCSSPEN with a new email address. Wait to get the confirmation email and click on the verification link. Sign in with your new email address and click on **Account Menu > Manage Login Emails** to remove your old email address.