# Employees' Pension and Investment Plan of Diocese of Lexington and Other Adopting Employers

Web Portal User Guide



nyhart

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#### Have questions? Ask...



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Email: <u>Noreen.Brown@nyhart.com</u>

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Toll Free: 800-428-7106

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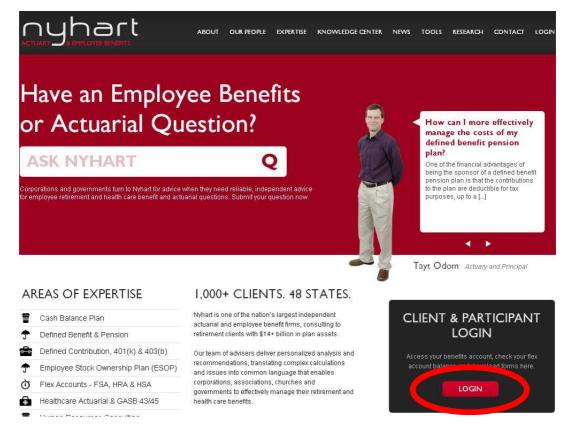
Address: 8415 Allison Pointe Blvd

Suite 300

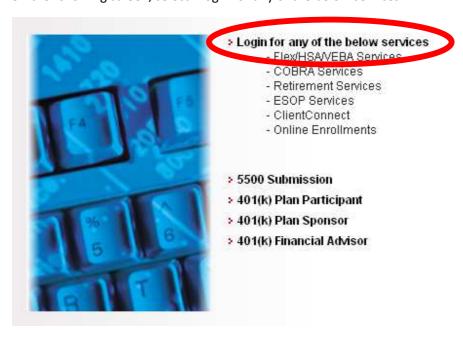
Indianapolis, IN 46250

#### **Website Login**

1. Begin by going to <a href="http://www.nyhart.com">http://www.nyhart.com</a> and click the "Login" button in the lower right portion of the screen.



2. On the following screen, select "Login for any of the below services".



### **Website Login**

3. Enter your User Name and Password on the right side of the screen. The login information is the same as used to view your annual statement. If it hasn't been changed previously, your login information will be as shown below.

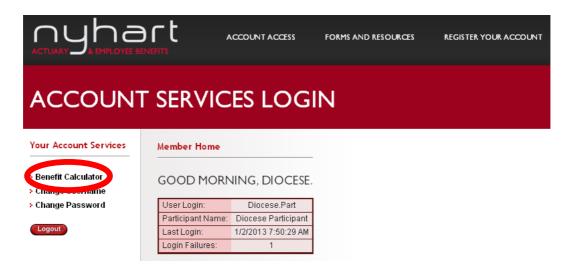
- Initial Username: SSN (without dashes)

- Initial Password: Date of Birth (MMDDYYYY)

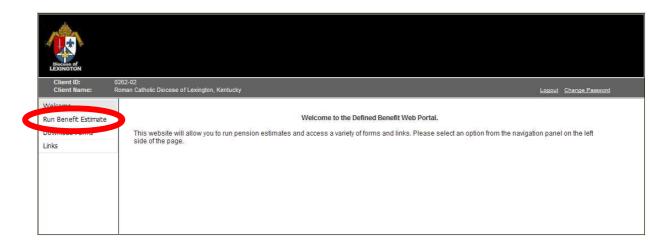
ONLINE ACCESS

User Name:	
Password:	
Login	

4. Select "Benefit Calculator" on the left side of the screen.

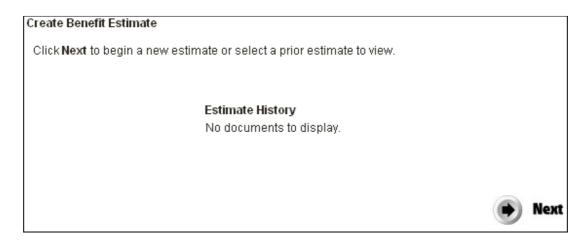


5. You will now see the Welcome page of your calculator.



#### **Run Benefit Estimate**

- 1. From the Welcome page, select "Run Benefit Estimate" on the left side of the screen.
- 2. The screen below will appear. Click "Next".



3. The following page will allow you to view your personal demographic information. You will only be allowed to make changes to the marital status and beneficiary's date of birth. Any other changes made will not be saved. After reviewing the data, select "Next".

Below are the data items available for modification.

Beneficiary changes are for estimate purposes only. Please complete and submit a Beneficiary Designation Form to change your beneficiary of record. The form can be found under the Download Forms section.

Participant Ir	nformation		
First Name	Test	MI Last Name	Person
Participant Date(s) Miscellaneous Data		nta	
Date of Birt	h 1/1/1950	Married	⊙Yes ○No
		Gender	Male 💌
Beneficiary	/ Information		
First Name	Spouse	MI Last Name	Person
Ben Type	Spouse		
Gender	Female 💌		
Date of Birt	h 1/1/1951		

#### **Run Benefit Estimate**

4. You will now see a page of your employment history. No fields on this page can be edited. Please review the data and contact Noreen Brown with any concerns. Select "Next".

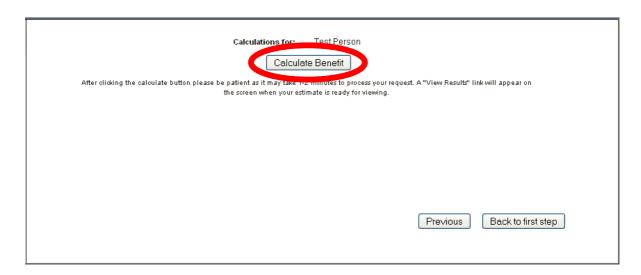
#### Employment History



5. After the personal information and history pages, you will see the Calculation Information page shown below. Input the appropriate dates and amounts.

Calculation Information for: Test Pe	rson		
Date of Termination	01/02/2013		
Date Payments Commence	03/01/2013	Use Age 65	Click this button if you wish to change the commencement date to the first day of the month following the participant's 65th birthday.
•	_		I to determine benefits payable at such date. Thi II change it to the first day of the month after you
Optional Fields:			
Annual Salary Increase (0%)			
If the Annual Salary Increase box is left blank,	compensation will p	roject at the most re-	cent reported amount.

6. After clicking "Next", you will see the final calculation page. To create the estimate, select the "Calculate Benefit" button.



#### **Run Benefit Estimate**

7. You should see the website loading on your screen while the benefit is being calculated (may take a few minutes), and if there were no errors in processing the benefit you will see the "View Results" button displayed. Click "View Results" to view the PDF of the benefit.



8. The benefit can also be retrieved from the "Estimate History" table displayed when you return to the initial "Run Benefit Estimate" page.

#### Create Benefit Estimate

Click Next to begin a new estimate or select a prior estimate to view.

#### **Estimate History**

<u>RequestTime</u>	
1/2/2013 8:16:56 AM	View PDF



## **Beneficiary Designation**

- Be sure to have a current Beneficiary Designation Form for this plan on file with Nyhart.
- Beneficiary Designation Forms can be found under the "Download Forms" section of the website as well as the end of this document.
- Please return completed forms to Noreen Brown at Nyhart and retain a copy for your records.

# nyhart

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Indianapolis, IN 46250

### **Benefit Eligibility**

You are immediately eligible for benefits under this plan upon any of the following:

- Cease participation or termination of employment (voluntary or in-voluntary) with less than 10 years of service
- Retirement, termination of employment (voluntary or in-voluntary), and meeting one of the following:
  - o Age 65 with 5 years of plan participation
  - o Age 55 with 10 years of service
- In-Service Distribution, no longer making contributions, currently employed with the Diocese, and attaining one of the following:
  - o Age 65 with 5 years of plan participation
  - o Age 65 with 10 years of service
  - o Age 60 with 30 years of service and 5 years of participation
- Death

Contact Noreen Brown at Nyhart with any questions regarding your retirement benefit from this plan or to apply for your benefit.

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