



From: DSJ Pension / Pension Live <specialist@dsjpension.org>

Sent: Friday, February 28, 2020 5:34 PM

Subject: Update to Your Pension Benefit on DSJPension.org / Logon Instructions

Dear Participant:

Updates to Your Pension Benefit

Your Cash Balance on the <https://dsjpension.org> website has been updated through 12/31/2019 to reflect Interest Credit and Pay Credit for 2019. We have also posted your 12/31/2019 Pension Statement under My Documents on the website.

The Pension Service Center and online access to your Diocese of San Jose Lay Retirement Plan (Plan A and Plan B) information provides an enhanced level of service to all participants. The Pension Service Center is your primary contact for all of your Diocese of San Jose Lay Retirement Plan (Plan A and Plan B) questions.

Please use your current login information to access your updated information on the website. If you have not yet logged onto the site, please follow the Logon Instructions below.

Logon instructions

- Go to <https://dsjpension.org/Account/Forgot.aspx>
- Enter your dsj.org email address
- Check your DSJ email for Email from applications@pensionlive.com
- Click link in Email to create your password
- Go to <https://dsjPension.org> and login using your newly created password
 - User Name – is your DSJ email address (ie, john.doe@dsj.org)

DSJ Pension Website – <https://dsjpension.org>.

You may use the website to ensure your information is complete and accurate, review and update spouse and/or beneficiary information and view and model your pension benefits at various retirement ages.

Please note: If you are married, the Pension Service Center and website need your spouse's date of birth on file in order to provide accurate benefit information. To update your personal contact information (address, etc.), make the changes in Workday. This information will update all records and flow to vendors for the Dioceses.

Pension Service Center

- Pension specialists are available by phone or email to answer your questions:
 - (833) 375-7367 between 6:00 am and 4:00 pm PST
 - specialist@dsjpension.org
- The Pension Service Center can answer questions for you if you are considering retirement or would like information on your benefits and the options available to you.

Also, below is a **Quick Reference User Guide** which contains some useful tips in navigating the features within the website.

Changing Your Email or Password (for Account Login or Password Reset Purposes)



DIOCESE OF
SAN JOSE

Welcome, Jane



Logout

Home Plan Information Help

Change Password
Email

PARTICIPANT INFORMATION

Simply click the  symbol at the top right of webpage to change your Password or Email.

My Pension Tab Features

On your My Pension Page, you can view your current and projected cash balance amounts.

My Pension My Data My Documents

Plan B - Cash Balance

\$30,708.96
Vesting: 100%
(As of 12/31/2019)

[Click here to view a chart of projected cash balance at different ages](#)


The amount above is based on your cash balance as of 12/31/2019. Your final benefit will be calculated at the time of retirement.

Clicking the **green text** above will open a chart that shows your projected cash balance at different ages.

CASH BALANCE BASED ON RETIREMENT AGE											
Age	55	56	57	58	59	60	61	62	63	64	65
Cash Balance	110,660.89	117,300.54	124,338.57	131,798.89	139,706.82	148,089.23	156,974.58	166,393.06	176,376.64	186,959.24	197,216.83

NOTE: The values shown in the table above are projected based on your cash balance as of 12/31/2019 with 6% annual return and assume you retire at the stated age.

My Data Tab Features

You can edit your preferred Contact Info by clicking on the  symbol. Please note this will not change your email associated with your site login.

PERSONAL INFORMATION		CONTACT INFO	ADDRESS
Jane Doe		Home Phone:	Primary Address:
SSN: XXX-XX-9955		Business Phone:	1234 Main Street
Employee Number: 983955		Cell Phone:	San Jose, CA 95136
Gender: F		Other Phone:	United States
Date Of Birth: 3/24/1963		Other Phone Note:	
		Fax Number:	
		Personal Email:	
		Business Email: jane.doe@dsj.org	
		Email Preference: Not Selected	


SPOUSE INFORMATION	EMPLOYMENT & PENSION PARTICIPATION STATUS		
No Spouse On Record	Current Employment Status:		
	<u>Status</u>	<u>Effective Date</u>	
	Active	1/13/2003	
	Current Pension Plan Status:		
	<u>Plan / Sub Plan</u>	<u>Status</u>	<u>Effective Date</u>
	Lay Retirement Plan - Plan A	Active	1/13/2003





SPOUSE INFORMATION	
Marital Status:	Select Marital Status ▼
Relationship Type:	Select Relationship Type ▼
First Name:	
Middle Name:	
Last Name:	
Suffix:	
Spouse SSN:	--
Spouse Gender:	Select Gender ▼
Spouse DOB:	/ /
Date of Marriage:	
Date of Divorce:	
Date of Death:	

If married, you can add Spousal Information by clicking on the  symbol.

By adding spousal information, you will be able to view additional Optional Forms of Payment on the My Pension tab when you click on View Options.

My Documents Tab Features

You can find prior Plan Benefit Statements or prior Beneficiary Designations on My documents page. You can open any document on this page by clicking on the  symbol.

			My Pension	My Data	My Documents
Drop files here					
Select File		Please select file(s) to upload.			
File Name	Document Type	Upload Date			
 12-31-19_PlanB_Statement	Benefit Statement	2/28/2020			
 12-31-18_PlanB_Statement	Benefit Statement	1/15/2020	