

Employer Newsletter

SPRING 2022



Retirement Ahead Webinars

We are pleased to provide Retirement Ahead webinars, where SHEPP members can learn more about their pension online at a time that is most convenient for them.

The live one-hour session provides the general information needed to help your employees plan for retirement. Upcoming sessions are posted at www.shepp.ca with new dates added on a recurring basis including options for morning, afternoon and evening sessions.

Since launching in Fall 2021, over 750 SHEPP members have registered to attend a Retirement Ahead webinar. An on-demand video recording of each webinar is also made available to all registered attendees following the session.



2021 Service Highlights

As part of SHEPP's Service Strategy, we continually aim to provide quality services that meet the needs of your employees. Here are some service highlights from 2021:

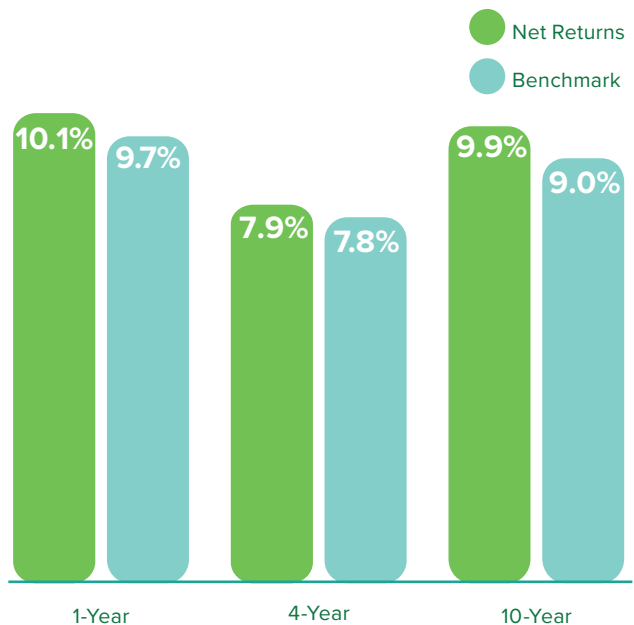
- ✓ 9,258 calculations processed and mailed to members by SHEPP
- ✓ 17,190 phone conversations with members
- ✓ 22,460 calculations online by members using **SHEPPweb** calculators

2021 Investment Performance

While markets recovered in 2021, our investment strategies and diversified portfolio positioned the Fund on solid footing to endure market volatility during times of short-term uncertainty.

Overall, the Fund experienced strong investment returns of 10.1% (net of investment management fees). These returns tracked ahead of the 9.7% benchmark, bringing total assets to \$9.7 billion (up from \$8.8 billion in 2020).

Total Fund Rate of Return
(annualised, net of investment management fees)
as at Dec 31, 2021



SHEPP's investment strategy is driven by Plan sustainability objectives. We remain focused on generating sufficient long-term returns to improve and maintain the Plan's funded position, secure members' benefits and stabilise contributions.



SHEPP Maps Out the Future

In 2022, SHEPP implemented a five-year rolling strategic plan which sets the priorities of the organisation and provides a framework for the initiatives we will undertake in working together to reach our goals.

Our goals are guided by outcomes we are seeking to achieve in the areas of people & culture, sustainability and stakeholder experience.

Three strategic goals have been identified as priorities for the Plan:

- ✓ **People & Culture:** Build cultural alignment by fostering a resilient, accountable and high-performing team.
- ✓ **Sustainability:** Drive Plan sustainability by securing the Plan's long term financial health.
- ✓ **Stakeholder Experience:** Elevate the experience of members and all Plan stakeholders.

SHEPP's strategic plan provides a flexible and responsive approach to risk management, involving continuous assessment of our strategic objectives while taking into consideration changes in our operating environment.

What does this mean for you and your employees?

SHEPP's Board and Administration remain committed to ensuring you can provide your employees with secure predictable retirement income at a reasonable cost and with administrative effectiveness. And we will continue to serve you and your employees in the accurate, timely, helpful and approachable way you have come to expect.



SHEPP

People. Pensions. Results.

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ServiceHub Launch Successful

We are pleased to announce the successful implementation of the new ServiceHub application and **SHEPPweb** Employer portal enhancements.

The ServiceHub has replaced our legacy data capture tool with an upgraded technology platform to provide employers with an improved user experience when submitting data.



New Features in the ServiceHub

Some of the new features in the ServiceHub application include:

- ✓ Streamlined monthly data reconciliation processing
- ✓ Immediate data submission reporting
- ✓ A user-friendly web-based interface with no application installation required
- ✓ An easy-to-use file upload feature for submitting data

With the release of the ServiceHub, a new landing page in the **SHEPPweb** Employer portal features some interactive reporting functions to support your SHEPP employer administration activities.



ServiceHub Training Sessions

Prior to implementation of the ServiceHub, our Employer Services team held online training sessions to provide employers with a demonstration of the new application. We appreciate the participation from those within your organisation that attended a training session. Video recordings of the sessions are also available for those that could not attend.

Questions?

If you have any questions, please contact our Employer Services team at employerservices@shepp.ca.