



SHEPPNews

2018

RETIRED MEMBER NEWSLETTER

Access and Manage Your Pension Information Online

SHEPPWeb makes it easy to keep your record up-to-date

Last fall, we launched **SHEPPWeb** for pensioners, a secure online portal which lets you access and update your pension information online.

Once you log in to **SHEPPWeb** you can:

- easily update your mailing address and contact information;
- access information about your pension and survivor benefits;
- download and print a copy of your most recent Pension Payment Confirmation Statement; and
- download and print a copy of your most recent T4A.

If you'd like to give it a try, but aren't sure exactly how to get started, visit www.shepp.ca and watch our video tutorials. We have a short video to guide you through the process of logging in for the very first time, and another to show you how to update your personal information and address.

As an existing pensioner you would have been mailed a letter providing you with your username and temporary password in October 2017. If you retired more recently, you can log in with the same username and password you used to access **SHEPPWeb** while you were employed. Your username is always your SHEPP Member ID number, found on your Pension Payment Confirmation Statement and Retirement Finalisation letter. If you have forgotten your password click the 'forgot password' link below the login box. If you no longer have your temporary password, or are experiencing difficulty logging in, contact SHEPP at 1.866.394.4440 or 306.751.8300 (in Regina) and we'll help you get set up.

It's easy to use
SHEPPWeb

Watch our how-to videos at
www.shepp.ca



UNDERSTANDING POST-RETIREMENT SURVIVOR BENEFITS

When you pass away, the payment of survivor benefits depends on the form of pension you chose at retirement.

Log in to **SHEPPWeb**, and select Pension Details from the web SERVICES menu, to review the form of pension you chose, including all relevant dates and information regarding the spouse or beneficiaries who may be payable upon your death.

T4A FOR FILING INCOME TAX

When it's time to file your income tax, you will need a T4A for your SHEPP pension (retirement or survivor), which indicates taxable income paid and the amount of tax withheld.

SHEPP mails your T4A to the home address we have on file by the end of February (or earlier if available) each year. Once the T4As have been mailed, a copy is also accessible online through **SHEPPWeb**.

To change the amount of income tax withheld from your SHEPP pension in the future, submit the required TD1 forms to SHEPP or send a signed fax or letter to SHEPP indicating the amount you would like deducted.



Your Privacy and Personal Information is Protected

SHEPP will not share your information with any individuals you have not previously authorised

SHEPP collects and maintains personal information for the purpose of administering pension benefits for Plan members, their spouses and beneficiaries. This information is retained indefinitely by SHEPP due to the long-term nature of pensions. That personal information has always been protected and kept confidential by SHEPP in accordance with our *Personal Information Policy*.

It is SHEPP's policy not to disclose your personal information to a third party unless you have provided SHEPP with written consent to do so. A third party refers to anyone but you, including your spouse and financial planner.

If you would like to authorise SHEPP to share your personal information with your spouse, financial planner or any other individual you identify, you may do so by completing and submitting an *Authorisation for Third Party Access to Private Information* form. This form allows SHEPP to share information only and does not allow the authorised individual to act on your behalf (i.e. they are not able to make changes to your pension record or banking information).

The only way you may authorise someone to act on your behalf is by appointing a Power of Attorney, and submitting the required legal documentation to SHEPP.

Visit www.shepp.ca for more information and to access the *Authorisation for Third Party Access to Private Information* form.

PLANNING TO RETURN TO WORK?

Once you begin receiving your SHEPP pension, you cannot make contributions toward another SHEPP pension nor can you build upon the one you are already receiving.

If you return to work

with a

SHEPP

employer,

your SHEPP pension will not be affected — you will not be required to make contributions to the Plan, and SHEPP will continue paying you your monthly pension.

If you start a job with an employer who participates in a pension plan other than SHEPP, you may enquire with them about participation in their pension plan. Your SHEPP pension will not be affected should you begin contributing to another pension plan.



2018 Pension Payment Schedule

Wednesday	January 31
Wednesday	February 28
Thursday	March 29
Monday	April 30
Thursday	May 31
Friday	June 29
Tuesday	July 31
Friday	August 31
Friday	September 28
Wednesday	October 31
Friday	November 30
Monday	December 31

IMPORTANT REMINDERS

Keep your personal information up to date

Changing your address

Update your address online through **SHEPPWeb** or contact SHEPP by email, phone or letter mail to ensure you receive your T4A and other SHEPP information in a timely manner.

Changing your account or financial institution

Let SHEPP know if your banking information changes. For security reasons, we require your new account information and your signature by fax or letter mail.

Changing your marital status or beneficiaries

Contact SHEPP with changes to your spousal information and beneficiaries. Depending on the form of pension you chose at retirement, a benefit may be payable upon your death. You can review your pension details, including the form of pension you chose by logging into **SHEPPWeb**.

