

# ***My Values***

## ***Secure Member Website Guide***

***Finding your way around the secure member website***



## **CONTENTS**

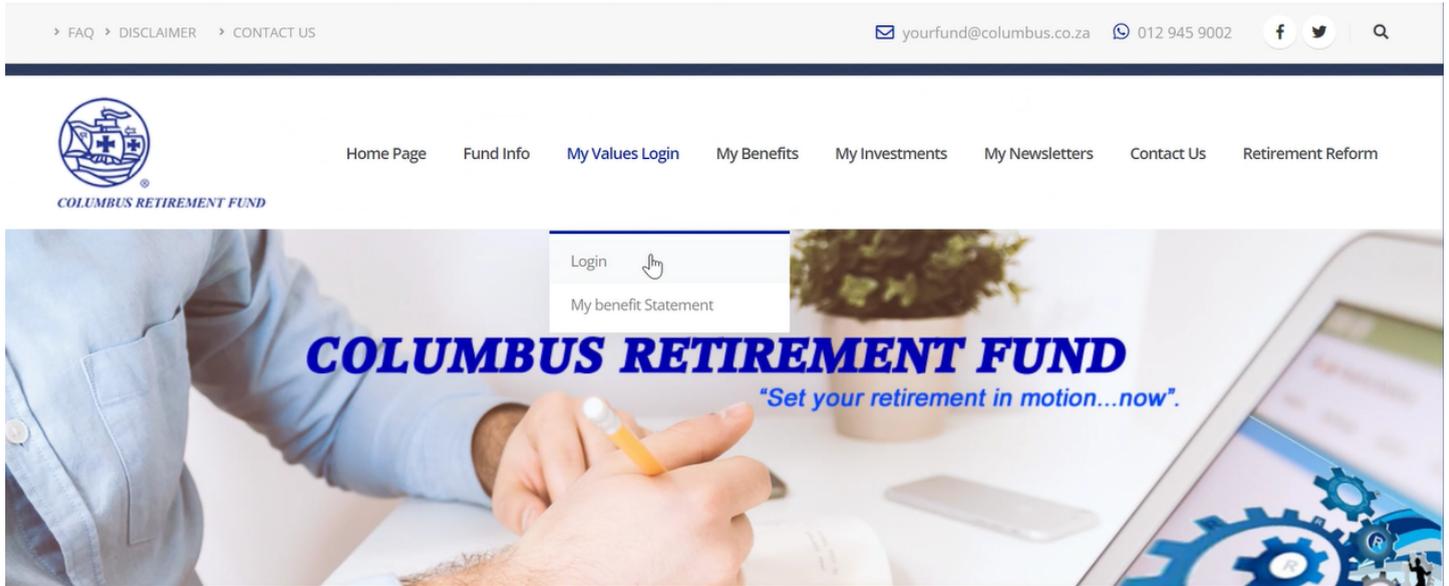
<b><u>HOW TO ACCESS THE SITE.....</u></b>	<b><u>1</u></b>
<b><u>ASSISTANCE.....</u></b>	<b><u>3</u></b>
<b><u>NAVIGATING THE MEMBER WEB.....</u></b>	<b><u>4</u></b>
<u>BENEFITS.....</u>	<u>5</u>
<u>BENEFIT STATEMENT.....</u>	<u>5</u>
<u>INVESTMENTS BALANCES.....</u>	<u>6</u>
<u>INVESTMENT CHOICE AND INVESTMENT STATEMENT.....</u>	<u>7</u>
<u>MONTHLY TRANSACTIONS.....</u>	<u>8</u>
<b><u>PERSONAL DETAILS.....</u></b>	<b><u>9</u></b>
<b><u>CONTACT US.....</u></b>	<b><u>9</u></b>



Every member of the Columbus Retirement Fund has access to his/her Retirement Fund records on the **Secure Member Website**. Logging on is a quick and easy process as per the steps indicated below:

## How to access the site

From the <http://yourfund.co.za.columbus> Fund website, click on **My Values Login** in the menu at the top and select **Login**:



**LATEST NEWS**

9 March 2022  
**Retirement Investments are for the long-term. Do not react to current events/affairs without discussing it with a seasoned investment professional**

---

20 December 2021  
**2021 Columbus Retirement Fund Board Appointments**

---

07 December 2021  
**Systems Changes and Access to Benefits**

---

01 December 2021  
**Merging of Pension Section and Provident Section**

---

12 May 2021  
**Announcement – Member Action Required**

---

Aug 2021  
**Delaying retirement by 5 years**

24 January 2022  
**SYSTEMS CHANGES AND ACCESS TO BENEFITS**

---

Investment Reports  
**Member Investment Report**

---

**Set your future in motion**

---

**VOTING POLL**

Did you know that a tax directive from SARS cannot be cancelled?

Yes  
 No

**Fund Forms**

---

**MEMBER GUIDE**

Death Benefits



**QUIZ**

When withdrawing your benefit in cash, only the first R25 000 is tax-free.

True

False

Get your **VALUES HERE**

[> LOGIN](#)

PREMIER

**THE NATIONAL**

**BUDGET**

Click Here

**EXPRESSION OF WISH FORM**

[Update It Today](#)



The following page will open:

The screenshot shows the Premier Benefits Member Site homepage. At the top left, the text reads "Premier Benefits Member Site" and "My Values Login". At the top right, there are navigation links for "HOME" and "MY VALUES LOGIN". The main content area features the Premier logo, the word "PREMIER" in large letters, and a paragraph explaining that users need their own username and password for login. Below this is a "Help:" section with contact information. A list of functionalities is provided, including accessing personal information, changing contact details, and viewing statements. A "Click here" link is provided for more information. On the right side, there is a sidebar with two blue buttons: "COLUMBUS RETIREMENT FUND MEMBER INTERNET ACCESS" and "REGISTRATION & LOGIN GUIDE". Below these buttons is a note about a user guide.

**Premier Benefits Member Site**  
My Values Login

HOME > MY VALUES LOGIN

You can access your Fund Credit on the Premier Benefits Secure Member Website. Premier Benefits has a fully interactive member website to allow members to take ownership of their own retirement provision.

**Get your VALUES HERE > LOGIN**

**PREMIER**

If this is the first time you are logging on, you need your own username and password, which were emailed to you. It is recommended that you change your password once you have logged on. If you have not yet received a system email or don't have access to email, please contact your Payroll Administrator who can provide you with the information.

**Help:**  
Should you experience any problems with accessing the web, please contact Premier Benefits under **Contact Us** or email the Fund at [yourfund@columbus.co.za](mailto:yourfund@columbus.co.za)

**On the Premier Benefits Secure Member Site you will have the following functionality:**

- Access your own personal information
- Change your contact details
- View your benefits and benefits statement
- View your investment statement
- View your investment choice
- View your transaction statement

**Click here** to find out more about Premier Benefits

**COLUMBUS RETIREMENT FUND MEMBER INTERNET ACCESS**

**REGISTRATION & LOGIN GUIDE**

Please **Click Here** to access a simple user guide which will help you to register, login and find your way around the Secure Member Site.

Now click on the **Login** icon.



The following page will open:

Your **username** is your **ID Number**.

Your **password** would have been e-mailed to you. If you do not have your password, please send an e-mail to [yourfund@columbus.co.za](mailto:yourfund@columbus.co.za) to reset your password. You will receive another e-mail with a new password.

## **Assistance**

For any other problems with logging on, please contact the number listed on the screen:

**(012) 945 9002.**

## Navigating the Member Web – To update from here

Once you have logged on, the following screen will appear:

**Retirement Plan Summary**

Your retirement plan entitles you to the following benefits:

Benefit	Frequency	Value in Rands
Member Dismissal	Lump Sum	40,232.85
Member Death	Lump Sum	783,176.85
Member Retrenchment	Lump Sum	40,232.85
Member Resignation	Lump Sum	40,232.85

**Your retirement plan details are as follows:**

Annual Pensionable Salary (R):

Member Contribution Rate (%):

Employer Contribution Rate (%):

Member Contribution Amount (R):

Employer Contribution Amount (R):

Normal Retirement Age:

Normal Retirement Date:

[View Benefits Statement](#)

[View Investments](#)

[View Transactions](#)

On this screen you have **3 options** in the menu at the top:

### Retirement Plan

View Benefit Statement  
View Investments  
View Transactions

### Personal Details

Here you can check your personal details. Send an e-mail to should any details be incorrect or need to be adjusted.

### Contact Us

The Fund contact details

Let's take a closer look at each of these.

## Benefits

The first page which opens after you have logged on will show you your total benefits, as well as your contributions and annual pensionable salary:

Benefits when you exit the Fund, or on death and disability

Benefit	Frequency	Value in Rands
Member Dismissal	Lump Sum	40,232.85
Member Death	Lump Sum	783,176.85
Member Retrenchment	Lump Sum	40,232.85
Member Resignation	Lump Sum	40,232.85

Your retirement plan details are as follows:

Annual Pensionable Salary (R):	185,736.00
Member Contribution Rate (%):	7.50
Employer Contribution Rate (%):	9.60
Member Contribution Amount (R):	1,160.85
Employer Contribution Amount (R):	1,485.89
Normal Retirement Age:	60
Normal Retirement Date:	2050/01/31

Your pensionable salary and contribution percentages. You can choose the level of your employer contributions. See the member booklet for more information on your contribution options.

View Benefits Statement  
View Investments  
View Transactions

## Benefit Statement

To view you benefit statement, click on **View Benefit Statement** on the **Retirement Plan** Page.

The following screen will pop-up:

File Download - Security Warning

Do you want to open or save this file?

Name: Benefits-Statement.pdf  
Type: PDF Document  
From: uak1.lautus.net

Open Save Cancel

While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not open or save this software. [What's the risk?](#)

View Benefits Statement  
View Investments  
View Transactions

Click on **Open**

Your benefit statement will display. You can now save this document on your PC.



**Columbus Retirement Funds**  
**Benefit Statement as at 2016/12/13**

This benefit statement reflects your personal membership details as they appear in the Fund's records. This statement also indicates the approximate values of your benefits.

#### Identification Information

Name	Member Columbus
Identity number	9001010010010
Employee number	1234
Paypoint	Columbus
Company	Columbus Stainless (Pty) Ltd

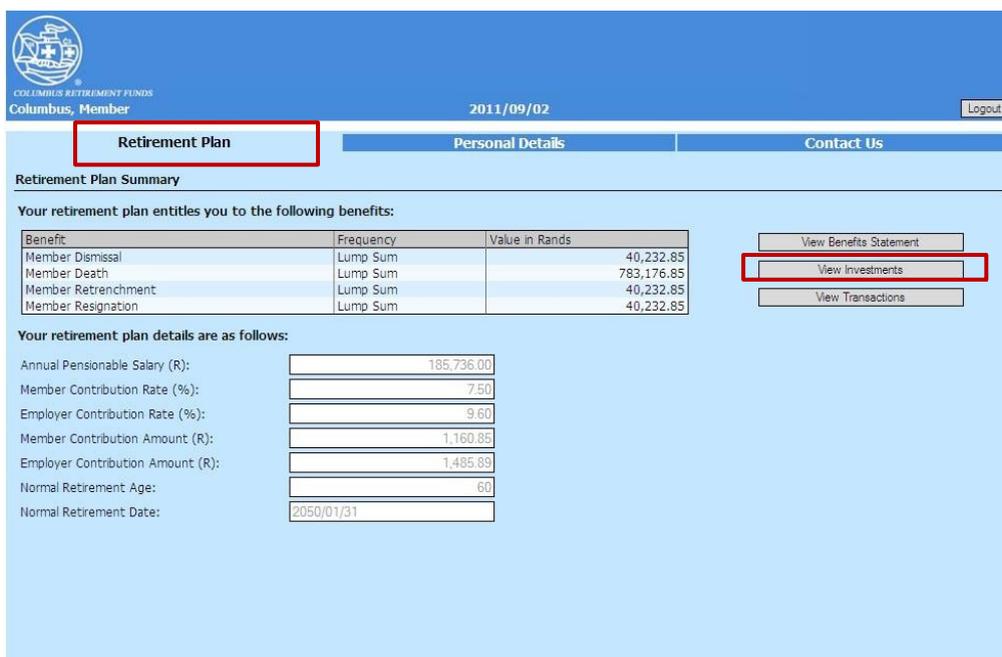
#### Personal Information

Date of birth	1990/01/01
Pension service date	2008/06/01

Should you have any questions on your benefit statement, please e-mail [yourfund@columbus.co.za](mailto:yourfund@columbus.co.za)

### **Investments Balances**

From the **Retirement Plan** page, you can access your Investment Values. Click on **View Investments**.



**Retirement Plan** | Personal Details | Contact Us

Retirement Plan Summary

Your retirement plan entitles you to the following benefits:

Benefit	Frequency	Value in Rands
Member Dismissal	Lump Sum	40,232.85
Member Death	Lump Sum	783,176.85
Member Retrenchment	Lump Sum	40,232.85
Member Resignation	Lump Sum	40,232.85

Your retirement plan details are as follows:

Annual Pensionable Salary (R):	185,736.00
Member Contribution Rate (%):	7.50
Employer Contribution Rate (%):	9.60
Member Contribution Amount (R):	1,160.85
Employer Contribution Amount (R):	1,485.89
Normal Retirement Age:	60
Normal Retirement Date:	2050/01/31

View Benefits Statement | **View Investments** | View Transactions

The following screen will open:

**Investment Balances**

**Pension**

Portfolio	Value in Rands
Life Stage Portfolio - Money Market	1,392.92
Life Stage Portfolio - Local Equities	17,654.07
Life Stage Portfolio - Local Bonds	5,655.35
Life Stage Portfolio - Offshore Equities	4,194.43
Assets in Transit	0.00
<b>Total</b>	<b>28,896.77</b>

**Provident**

Portfolio	Value in Rands
Life Stage Portfolio - Money Market	546.26
Life Stage Portfolio - Local Equities	6,927.29
Life Stage Portfolio - Local Bonds	2,217.60
Life Stage Portfolio - Offshore Equities	1,644.93
Assets in Transit	0.00
<b>Total</b>	<b>11,336.08</b>

Your total investment portfolio is worth **R 40,232.85**

Buttons: View Investment Choice, View Investment Statement

On this page you can now view the total amounts invested for you in each of the portfolios you have chosen. The Pension and Provident Values are shown separately.

**Investment Choice and Investment Statement**

From this page you can also go to the following pages:

**View Investment Choice**

**LifeStage Portfolio - Columbus Lifestage**

Portfolio	%
Life Stage Portfolio - Money Market	5.00
Life Stage Portfolio - Local Bonds	20.00
Life Stage Portfolio - Local Equities	60.00
Life Stage Portfolio - Offshore Equities	15.00

This screen shows the split of your Future Contributions into the different portfolios.

**Please note**, if you are invested in the Life Stage portfolio, this screen shows the split of your Current and Future contributions.

**View Investment Statement**

**Life Stage Portfolio - Money Market**

Date	Description	Value in Rands
2011/01/02	Opening balance	82,659602
2011/02/28	Investment Fees for 2011/01/31->2011/02/28	-0.018472
2011/03/02	Contribution 2011/01/01->2011/01/31	6,850668
2011/03/02	Contribution 2011/01/01->2011/01/31	57,123719
2011/03/17	Investment Fees for 2011/02/28->2011/03/16	-0,045203
2011/03/17	Investment Fees for 2011/02/28->2011/03/16	-0,002674
2011/03/17	Contribution 2011/02/01->2011/02/28	6,831396
2011/03/17	Contribution 2011/02/01->2011/02/28	17,073549
2011/04/08	Investment Fees for 2011/03/31->2011/04/07	-0,044761
2011/04/08	Investment Fees for 2011/03/31->2011/03/31	-0,005166
2011/04/18	Contribution 2011/03/01->2011/03/31	6,791781
2011/04/18	Contribution 2011/03/01->2011/03/31	16,976527
2011/05/20	Investment Fees for 2011/04/30->2011/04/30	-0,050894
2011/05/20	Investment Fees for 2011/04/30->2011/04/30	-0,008594
2011/05/24	Contribution 2011/04/01->2011/04/30	6,743840
2011/05/24	Contribution 2011/04/01->2011/04/30	16,856695
2011/06/15	Investment Fees for 2011/05/31->2011/05/31	-0,050578

This screen shows all the transactions on your investment account. This includes Contributions coming in (+) as well as Investment Fees and Switch Costs being deducted (-). On this screen you will see the unit prices as well as units bought or sold for each of these transactions.

You can choose the dates of the report at the top of the screen.



## Monthly Transactions

From the main **Retirement Plan Page**, you can also view the Monthly Transactions. Click on **View Transactions** in the menu on the right:

The screenshot shows the member portal for Columbus Retirement Funds. The user is logged in as 'Columbus, Member' on 2011/09/02. The 'Retirement Plan' tab is selected. The page displays the Retirement Plan Summary, including a table of benefits and a list of retirement plan details. The 'View Transactions' button is highlighted with a red box.

Benefit	Frequency	Value in Rands
Member Dismissal	Lump Sum	40,232.85
Member Death	Lump Sum	783,176.85
Member Retrenchment	Lump Sum	40,232.85
Member Resignation	Lump Sum	40,232.85

Your retirement plan details are as follows:

Annual Pensionable Salary (R):	185,736.00
Member Contribution Rate (%):	7.50
Employer Contribution Rate (%):	9.60
Member Contribution Amount (R):	1,160.85
Employer Contribution Amount (R):	1,485.89
Normal Retirement Age:	60
Normal Retirement Date:	2050/01/31

The following screen will open:

The screenshot shows the member portal for Columbus Retirement Funds. The user is logged in as 'Columbus, Member' on 2016/12/13. The 'Contact Us' tab is selected. The page displays contact information for Mrs. Lezelle Meyer.

<b>Mrs. Lezelle Meyer</b>	
Tel:	012 648 9180
Fax:	
Email:	lmeyer@globaladmin.co.za

On this page, you can also choose the **Start** and **End** dates. This screen shows all the transactions as Rand amounts.

## Personal Details

One of the main menu options at the top is **Personal Details**. You will not be able to make any changes on this screen, but should you need amendments, kindly send an e-mail with the required amendments to [yourfund@columbus.co.za](mailto:yourfund@columbus.co.za).

COLUMBUS RETIREMENT FUNDS  
Columbus, Member

2011/09/02 Logout

Retirement Plan **Personal Details** Contact Us

**Personal Details**

Identification Number: 9001010010010 Change Password

First Names: Member

Last Name: Columbus

Date of Birth: 1990/01/01

Marital Status: Single

**Physical Address**

Line 1:

Line 2:

City:

Region:

Code:

Country: South Africa

**Postal Address**

Line 1:

Line 2:

City:

Region:

Code:

Country: South Africa

Home Telephone Number:

Work Telephone Number:

## Contact Us

Here you will be able to see the Contact Details of the Administrator.

COLUMBUS RETIREMENT FUNDS  
Columbus, Member

2011/09/02 Logout

Retirement Plan Personal Details **Contact Us**

**Contact Us**

<b>Ms Anita de Vos</b>	
Tel:	012 648 9180
Fax:	
Email:	