

Principal Retirement Service Centre

Manage Your Pension Accounts *at your fingertips!*

The **Principal Retirement Service Centre**, an Internet based retirement management platform, provides you with the flexibility to manage your pension account anytime, anywhere. Its interactive features help you access your latest pension account information, fund performance, contribution history as well as view member record and vested benefits.

How to get started?

- Go to www.principal.com.hk.
- Select login type of **Employer / Company**.
- Input your **Login ID** and **PIN** to access your account.
- For security reason, you are requested to change your PIN during the first login.

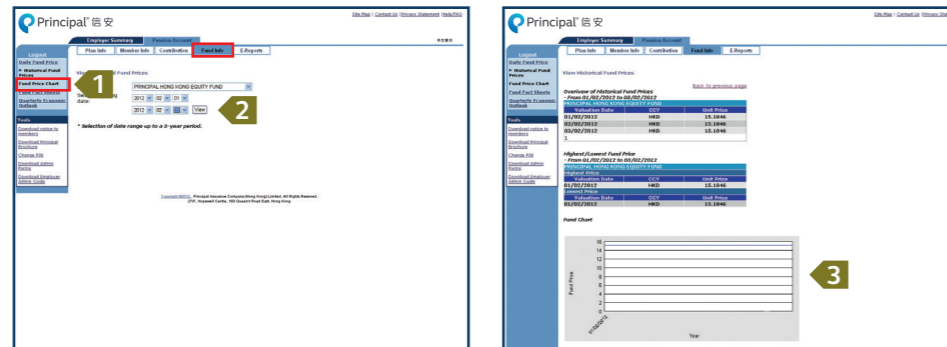
Tips: Your Login ID is printed at the bottom right hand corner of your Membership Certificate (Employer's Copy). Your PIN will be posted to your registered address upon successful enrollment.

Functions Highlight:

1) Fund Price History (Available for Employers and Employees)

- Allows employers to view fund price history in the selection of date range up to a three-year period. The function also provides the **highest** and **lowest fund price** within the selected period as well as a **line chart** for easy reference.

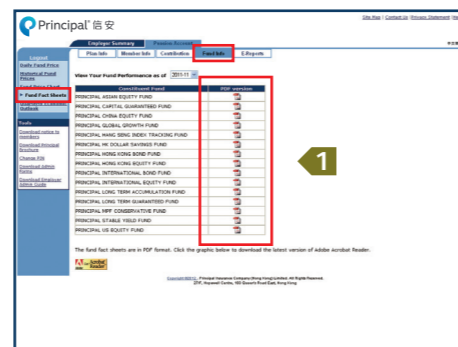
1. On the page of **Pension Account**, select **Fund Info**, and click **Fund Price Chart**.
2. After selecting fund and period, the **highest and lowest fund price** and the **price history** will be shown.
3. A **fund price chart** will be shown at the bottom of the page.



2) Fund Fact Sheets (Available for Employers and Employees)

- Updated pension fund fact sheets are available for download.

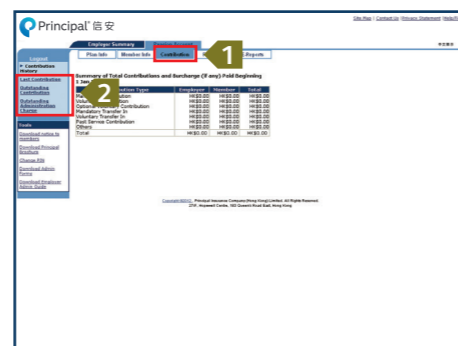
1. On the page of **Pension Account**, select **Fund Info**, then click **Fund Fact Sheets**. Click the PDF icon for the fact sheet you need to view.



3) Contribution History

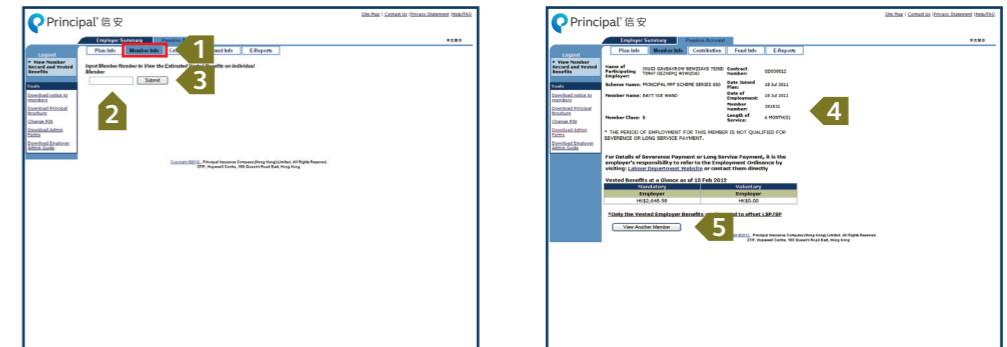
- Provides employers with information on Last Contribution, Outstanding Contribution and Outstanding Administration Charges.

1. On the page of **Pension Account**, select **Contribution**.
2. Select the type of contribution information you need to view from the left navigation bar.



4) View Member Record and Vested Benefits

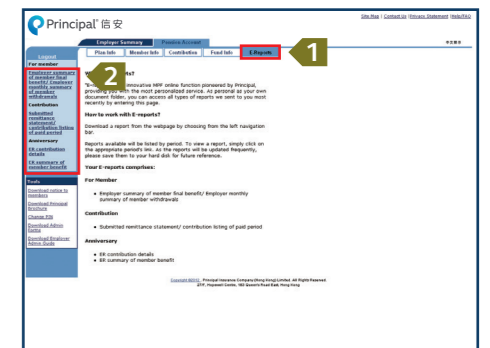
1. On the page of **Pension Account**, click **Member Info**.
2. Input **Member Number** to view the Vested Benefits derived from employer's contributions on individual member.
3. Click **Submit**.
4. Member record and the Vested Benefits of the selected member will be shown.
5. Click **View Another Member** to view information for another member.



5) Download E-Reports

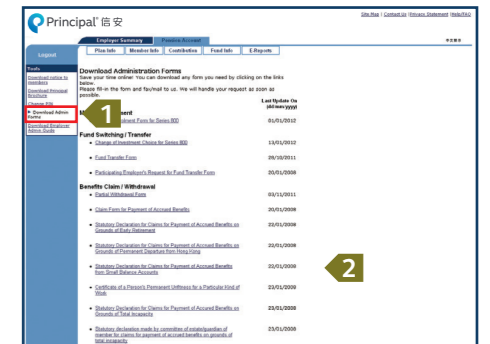
- As personal as your own document folder, this function gives you access to all types of reports we sent to you.

1. On the page of **Pension Account**, click **E-Reports**.
2. Select the type of report you want to view from the left navigation bar.



6) Download Admin Forms

1. Click **Download Admin Forms** in the tool box.
2. Download the form you need by clicking on the links.
3. Fill in the form and fax/mail to us. We will handle your request as soon as possible.



Other main functions for Principal Retirement Service Centre

- ✓ Check Pension Account Balance
- ✓ View Investment Allocation
- ✓ View Company Facts
- ✓ Download Notice to Members
- ✓ Download Employer Admin Guide

View Online Demo at www.principal.com.hk
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Principal Retirement Service Centre User Guide for Employer