



## GETTING THE MOST FROM THE MERCER WEB

The Mercer KiwiSaver scheme website has a number of great features to help you stay in control of your retirement savings. We're continuing to develop the Mercer KiwiSaver scheme website to enable you to do more with your savings. Here you'll find some helpful hints to help you update your PIN and contact details, view and select your investment options, update your PIR, select your communication preferences online and much more.

### Check your balance

You don't have to wait for your annual statement to find out how much retirement savings you have to date.

To check your balance now, please sign in to **mercerkiwisaverscheme.co.nz**. You can view your current balance on **Your Super Value** page.

### View your account summary

View a summary of the amounts coming in and going out of your retirement savings since your last annual statement on the **account summary** page.

The account summary page shows:

- Your contributions
- Your investment earnings for the period
- Any administration fees or other deductions from your account

### Your transaction history

View a more detailed description of your retirement savings on the **transaction history** page where you'll find a list of day-to-day transactions for your account from the date of your last annual statement to the current date.

\* Please note, investment earnings are not shown in your transaction history.

## Keep track of your contributions

You can also see a breakdown of the contributions that have been received into your account by signing into **mercerkiwisaverscheme.co.nz** and clicking on the Contributions section. There you'll find a breakdown of contributions made by you and your employer for the current financial year.

To view amounts deposited in to your account for each contribution type click on **History**. The amounts deposited can only be viewed for the current and the last financial years.

## Select your PIN

So many things require a PIN these days, that it can be difficult remembering them all. Did you know you can change your PIN for the Mercer KiwiSaver scheme to one that's memorable to you? Your PIN can be up to eight characters long, and be either letters, numbers, or a combination of both.

If you supplied your email address before, simply click on reset your PIN in the member sign in box and follow the instructions.

Alternatively, sign into the website and follow the instructions below.

- Click on the **personal details tab** in the grey bar at the top of the page. All your details will then be displayed
- Click on **update PIN**
- Enter your current PIN in the existing PIN field
- Enter your new PIN in the second box
- Re-enter your PIN in the third box

We recommend you change your PIN to something that is memorable to you, but not easy for other people to guess. We also recommend you keep your PIN secure and do not let anyone else know it.

## Update your contact details

If you have moved house, you may not be receiving information about your retirement savings from Mercer. To make sure you receive this information, check that your details are correct and update them if something has changed. You can change your address details online by signing into **mercerkiwisaverscheme.co.nz** and following these instructions.

- Click on the **personal details tab**
- Click on update **contact details**
- Enter your new details
- Click on submit changes

## Select your communication preferences

You can select to receive your scheme communications including annual reports, newsletters, notices and annual statements via email or post through the **Update your communication preferences** section on the **Update your current details** page. You can also opt out of receiving some communications through this facility.

To update your communication preferences, sign into **mercerkiwisaverscheme.co.nz** and follow the instructions below.

- Select the **Personal details** tab in the toolbar at the top of the page. This is where your current details including name, address, email address, mobile number and communication preferences are stored.
- Click on the **Update your current details** link towards the bottom of the page
- Your communication preferences will now be visible. Use the radio buttons to indicate how you would like to receive each communication type. You can click on each communication type for a more detailed explanation.
- Confirm you have read the supporting important information and click **Next step**
- Review your changes and then select **Confirm changes**
- You will then be taken to the confirmation page where you are issued with your receipt number.

## Change your Investment Options

To change your investment options, sign into **mercerkiwisaverscheme.co.nz** and follow the instructions below.

- Click on the **Your investments** tab in the grey bar at the top of the page. Here you will find information about how your savings are currently invested
- Click on **change investments**
- Tick whether the new investment strategy is to apply to **your current account balance** or **future contributions only (or both)**
- Enter the desired percentage value for each of the investments options that you are selecting. Please note that the website can only display whole numbers and that the total for all options must add up to 100%\*
- Click **submit change**
- Wait for a **confirmation** screen, check that details are correct and select confirm
- Wait for a screen with your **receipt number**. Write the number down and keep it in a safe place or print the page.

**IMPORTANT:** If the confirmation screen does not appear please check that you have your pop up blocker turned off for this site.

\* To read the details about each of the investment options simply click on the name of the investment option.

## Unit pricing and your units in the scheme

Unit pricing is used by many retirement savings schemes to keep track of each member's share in an investment option on any given day.

The **Unit prices** page details the entry and exit prices for each investment option in the Scheme. The Unit prices page allows you to download the unit prices for a particular date into an Excel spreadsheet to compare historical unit prices and current unit prices. The number of units you have in a particular investment option is shown on the **Your investments** page.

## Update your PIR

To select or change your PIR, sign into the website and follow the instructions below.

- Click on the **personal details** tab in the grey bar at the top of the page. Here you will find a summary of your personal information
- Click on **update PIR**
- Select which PIR you wish to change to, **10.5%, 17.5% or 28.0%**
- Tick whether the PIR is to take effect from today or from the next tax year beginning 1 April
- Click **submit change**
- Wait for a **confirmation** screen, check that details are correct and select **confirm**
- Wait for a screen with your **receipt number**. Write the number down and keep it in a safe place or print the page.

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