



LENO PENSION PORTAL EMPLOYEE GUIDE



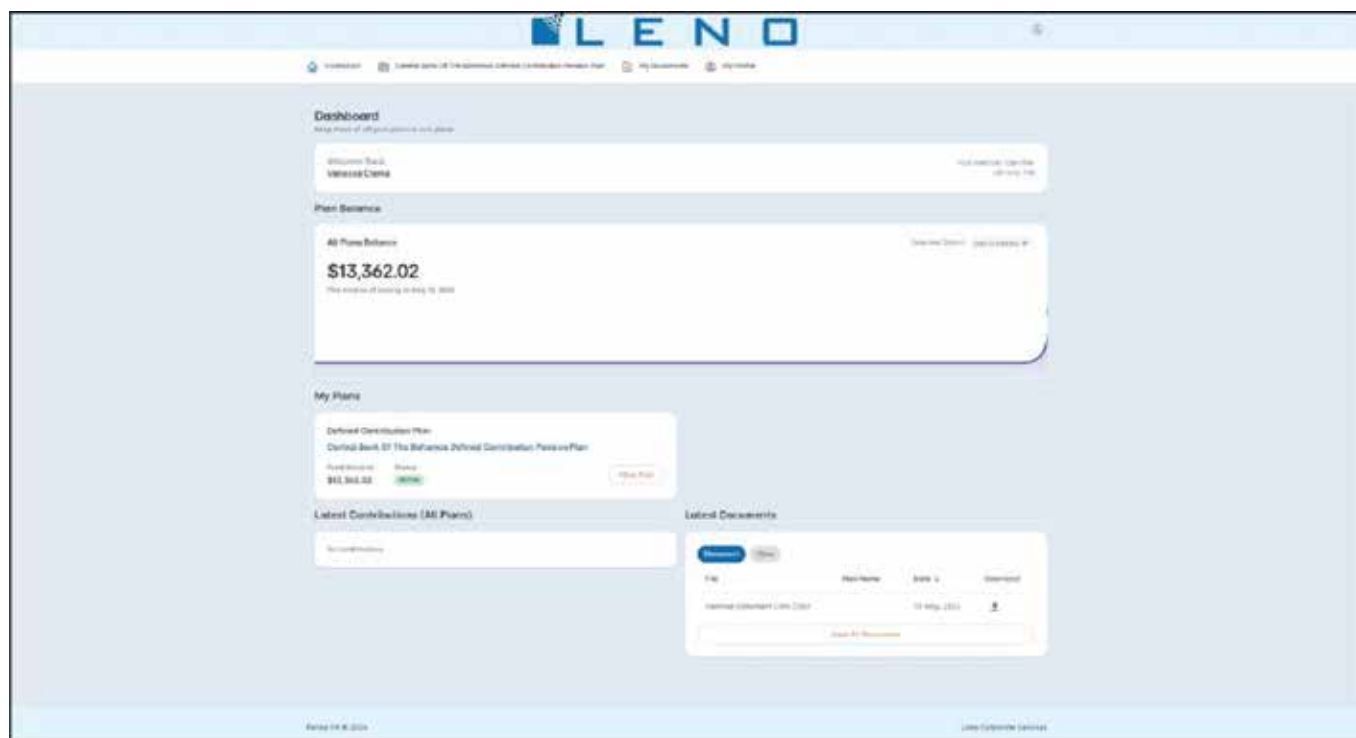
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DASHBOARD

The Leno Members Pension Plan Dashboard includes:

- The member's name
- Unique Personal Identifier (UPI)
- Graph of all plans combined balance. The member can click their cursor along the blue line within the grid to see previous month end values.
- List of each plan and their corresponding fund balance and plan status, Selecting View Plan will automatically bring the member to the Pension Plan page.
- Latest contributions in all plans, and
- Latest uploaded documents.



PENSION PLAN

To view details specific to a particular plan, click the Pension Plan button located next to the main dashboard button.

The members Pension Plan page displays the member's information, summary of the plan balance, summary of the fund balance and allocations, plan details such as contributions, transactions, beneficiaries, and statements.

If the member belongs to more than one pension plan, a tab called Plans will appear in which the member will select the plan they wish to view via a dropdown menu.

The screenshot displays the LENO Pension Portal interface. At the top, the LENO logo is visible. Below the navigation bar, the page title is "Central Bank Of The Bahamas Defined Contribution Pension Plan". The main content area is divided into several sections:

- Member Information:** A table with four columns: Plan, Status, Inception Date, and Plan Type. The data shows the plan is "Central Bank Of The Bahamas Defined Contribution Pension Plan", status is "ACTIVE", inception date is "Apr 6, 2007", and plan type is "DC".
- Plan Balance:** A large white box displaying the plan balance as "\$13,362.02" with a note "As of December 31st closing on May 12, 2024".
- Fund Balance:** A table with five columns: Fund Name, Fund Type, Current Value, Units, and Unit Value. The data shows the fund is "Central Bank Investment Fund", type is "Unfunded", current value is "\$13,362.02", units are "(13,362.02)", and unit value is "\$1.00".
- Plan Details:** A section with four tabs: Contributions, Transactions, Beneficiaries, and Statements. The "Contributions" tab is selected, showing a "Contributions" section with a "See contributions" link.

At the bottom of the page, there is a footer with "Period 01/01/2024" and "Leno Corporate Services".

Note: The member can click their cursor along the blue line within Fund Balances to see previous month end values.

THE MEMBER INFORMATION SECTION

Displays the information such as employment start date, status in plan, plan entry date, status date, and plan type.

Member Information			
Plan	Status	Status Date	Plan Type
Central Bank Of The Bahamas Defined Contribution Pension Plan	ACTIVE	Apr 3, 2017	RPP
Employment Start Date	Plan Entry Date	Fully Vested Date	Plan Sponsor
Oct 1, 2016	Apr 1, 2017	Jan 3, 2027	Central Bank Of The Bahamas

THE PLAN BALANCE SECTION

Displays a graphic representation of the member's plan balance and amount.



To view Contribution Allocation, the member can select the View Contribution Allocation button within the Plan Balance section. This will display the contribution allocation breakdown and funds.

THE FUND BALANCE SECTION

Displays the fund name, fund type, current value, units, and unit values as of the date noted in the top right-hand corner of the Fund Balance section.



THE PLAN DETAILS SECTION

Displays separate tabs with information on Contributions, Transactions, Beneficiaries, and Documents for the specific plan for the member.

The contributions tab shows the (Blank) on the latest contributions.

Plan Details

Contributions Transactions Beneficiaries Documents

Contributions

No contributions

The Transaction Tab shows the latest transactions (contributions as well as other types of transactions).

Plan Details

Contributions Transactions Beneficiaries Documents

Transactions

No transactions

The Beneficiaries tab show:

- The assigned benefices for the Pension Plan.
- The beneficiaries relationship to the Pension Owner
- Disbursement Percentage Split
- Whether or not the beneficiary is a minor.

Contributions Transactions Beneficiaries Documents

Beneficiaries

Effective as of Apr 3, 2017

Beneficiary Name	Relationship	Percentage	Minor
Shirley Clarke	Mother	100%	No

Contributions Transactions Beneficiaries Documents

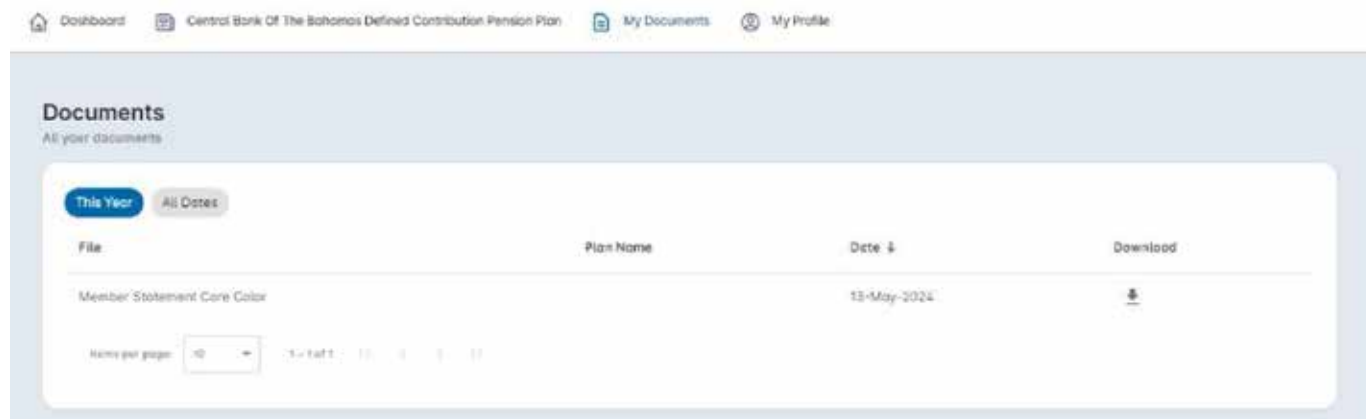
Plan Documents

No plan documents

MY DOCUMENTS

The member can view documents uploaded for the member by the plan administrator or employer within the My Documents page.

Examples of documents which may be available for the member are statements and allocation reports.

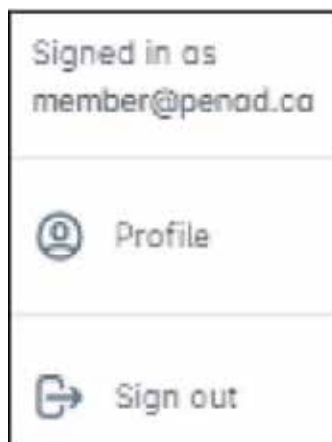


The member can download the files to view on their PC.

MY PROFILE

The My Profile page displays the member's ID, Personal Information such as name, gender, date of birth and marital status, address and contact information.

The profile page can also be accessed by clicking on the icon in the top right-hand corner on the web page.



Note: This is also where a user will sign out.

PROFILE

The Member Profile Page is divided into three (3) sections.

- Profile
- Employment
- Account

Profile

The member's general information is displayed within the profile section of the Member Profile.

The Member Profile Tab includes the following information:

- Member ID
- Name, Gender, Birthday
- Address
- Contact Information

The screenshot displays the 'Member Profile' page. On the left is a sidebar with three tabs: 'Profile' (selected), 'Employment', and 'Account'. The main content area is titled 'Member Profile' with the subtitle 'This is what we know about you'. It contains three sections: 'Profile' with a 'Member ID' field showing '011-978-799'; 'Personal Information' with fields for Name ('Vanessa Nokoma Clarke'), Gender ('Female'), Birthday ('May 1, 1979'), and Marital Status ('Single'); and 'Address' with two entries: a primary address at '88 Ocean Street, Golden Gates, Nassau New Providence, N-1098, Bahamas' and a secondary address at '123 Main St., WestCity, Canada'. Below these is a 'Contact Information' section with three entries: a name 'Vanessa Clark', an email 'Vanessa Clark • vclarke@test.co • Personal', and a phone number 'Sample • +1 (242) 519-4547 • Alternate'. Each entry has edit and delete icons. 'Add Address' and 'Add Contact Information' buttons are located at the end of their respective sections.

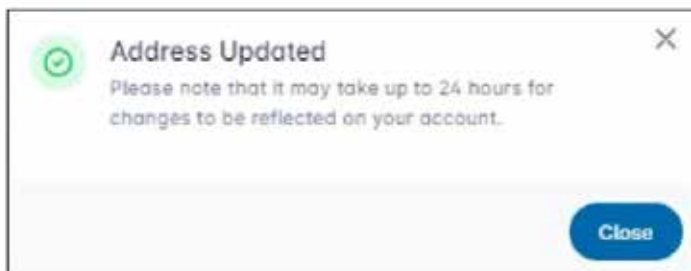
Address and Contact Information

Within the My Profile page, the member can update or delete their address and contact information.

UPDATING A MEMBER'S ADDRESS

- Step 1: Within the address section of the page, select the edit button to update the address.
- Step 2: Enter the updated address information.
- Step 3: Note one address must be set as primary.
- Step 4: Press the update button to save the information.
- Step 5: Note it may take up to 24 hours for the member's updated information to be reflected.

The screenshot shows a form titled "Edit Address" with the subtitle "Edit an existing address". The form contains the following fields: "Address*" with the value "18 Ocean Street", "Address 2" with the value "Golden Gates", "City*" with the value "Nassau New Providence", "State" (empty), "Zip Code" with the value "N-1898", and "Country*" with the value "Bahamas". There is a checkbox labeled "Primary Address" which is checked. At the bottom right, there are "Cancel" and "Update" buttons.



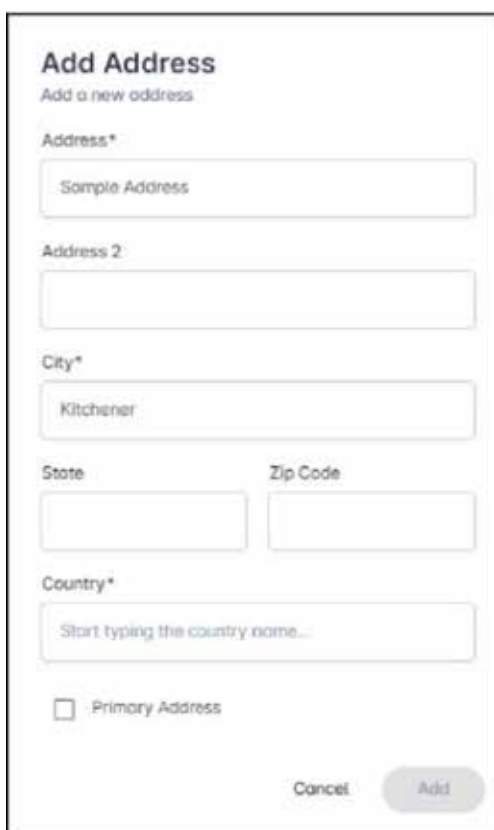
ADDING A MEMBER'S ADDRESS


The member can add an address:

Step 1: Select Add Address within the address section of the page.




Step 2: Enter the new address information.

A form titled "Add Address" with the subtitle "Add a new address". It contains several input fields: "Address*" with a placeholder "Sample Address", "Address 2", "City*" with a placeholder "Kitchener", "State" and "Zip Code" side-by-side, and "Country*" with a placeholder "Start typing the country name...". At the bottom, there is a checkbox labeled "Primary Address" and two buttons: "Cancel" and "Add".

Step 3: The member can delete an address by selecting the delete button  and confirming.


Note: one address must be set as primary.

UPDATING MEMBER CONTACT INFORMATION

Step 1: Within the contact information section of the page, select the edit button  to update the contact information.



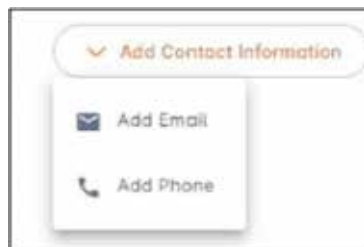
Step 2: Press the checkmark to confirm the update.

Step 3: The member can delete contact information by selecting the delete button  and confirming.

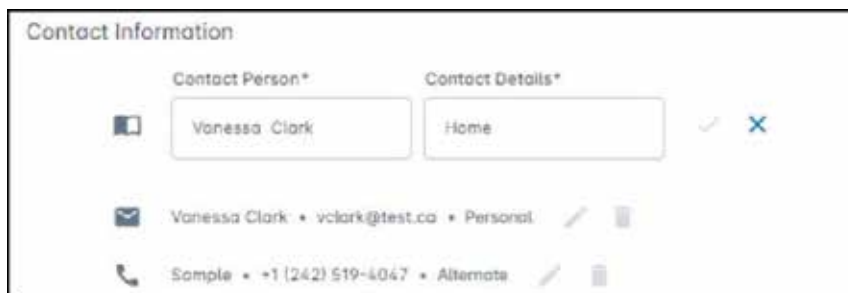
ADDING MEMBER CONTACT INFORMATION

The member can add contact information:

Step 1: Select Add Contact Information within the address section of the page.



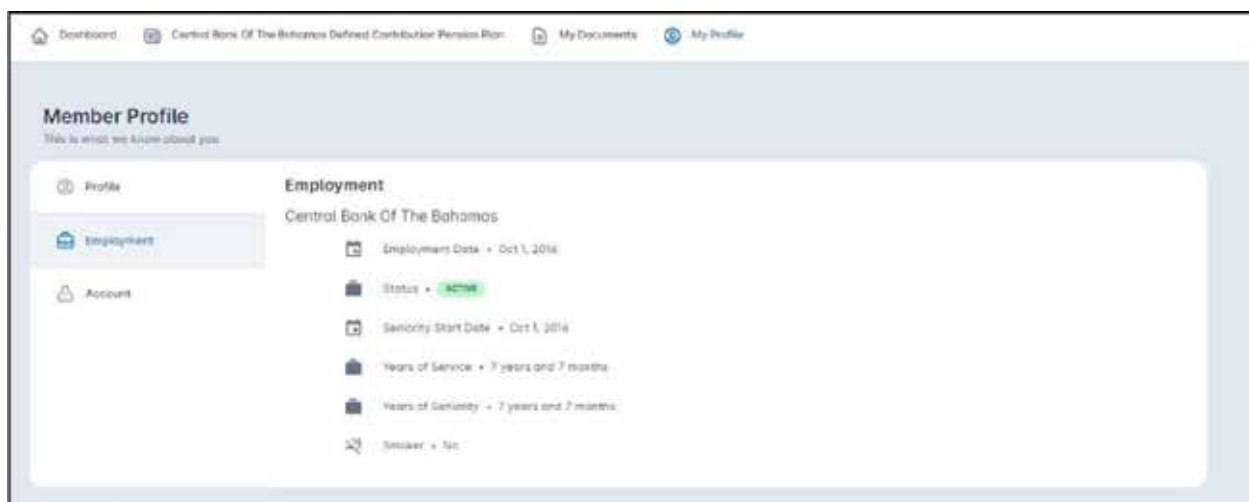
Step 2: Enter the new contact information (email or phone).



Step 3: Press the checkmark to confirm the update

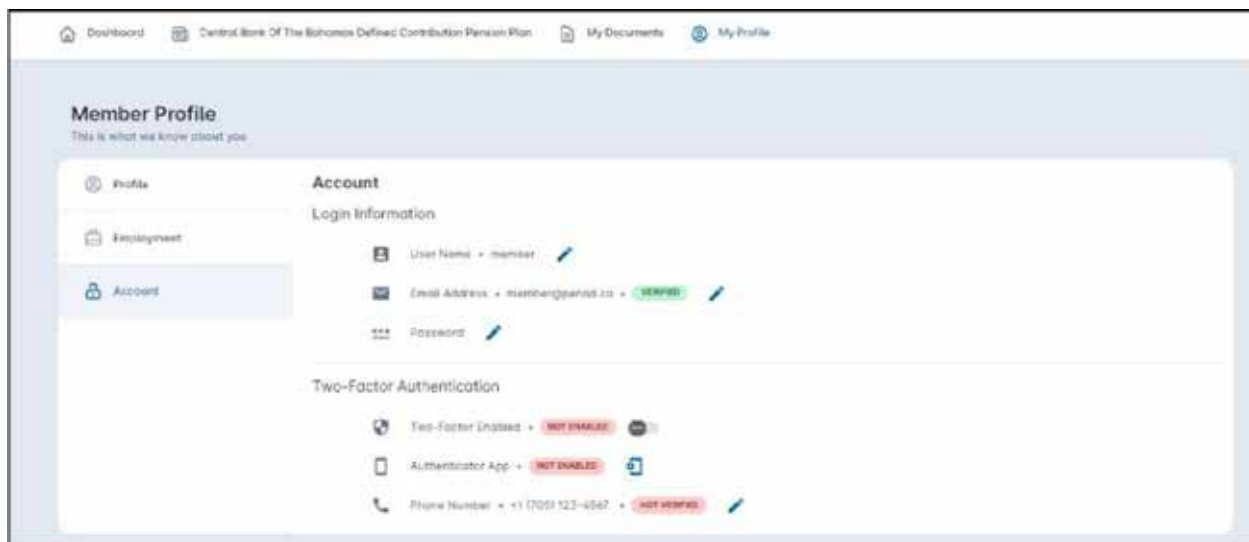
EMPLOYMENT

The member's Employment information and status is displayed within the Employment section of the Member Profile.




ACCOUNT TAB

The Account Tab member's web login information will be displayed within the Account section of the Member Profile.



Note: Once two-factor authentication has been enabled, it can not be disabled.

UPDATING ACCOUNT SETTINGS

Updating Username: To update User Name, select the edit button  beside User Name and enter the updated information.



Update User Name
Update your user name


New User Name*

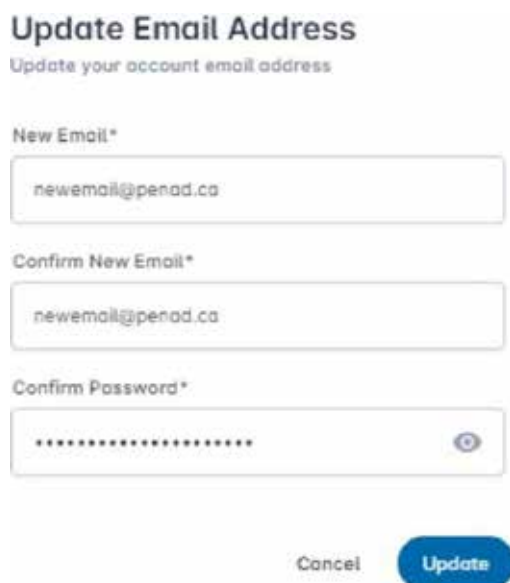
user2

Confirm Password*

..... 

Cancel Update

Updating Email Address: To update Email address, select the edit button  beside the email address and enter the updated information.



Update Email Address
Update your account email address


New Email*

newemail@penad.ca

Confirm New Email*


newemail@penad.ca

Confirm Password*

..... 

Cancel Update

UPDATING ACCOUNT SETTINGS *(Continued)*

Updating Password: To update Password, select the edit button  beside the password and enter the updated information.

Update Password

Update the password for your account

Current Password*



New Password*



Confirm New Password*



Passwords must match

Password Requirements:



- Minimum of 8 characters
- At least one alphanumeric character
- At least one non-alphanumeric character
- At least one digit (0-9)
- At least one uppercase letter



Two Factor Authenticator



To update two-factor authentication the user can enable by selecting enable and following the prompts.

Note: once two-factor authentication is enabled it cannot be disabled for the member.

Two-Factor Authentication

 Two-Factor Enabled • NOT ENABLED 

 Authenticator App • NOT ENABLED 

 Phone Number • N/A 



CONNECT WITH LENO

Let's build your financial future together.
Reach out today!

2nd Floor, Pineapple Place, Bernard Road,
P.O. Box N-8339, Nassau, The Bahamas

Phone: 1.242.396.3225

Fax: 1.242.396.3249

Email: connect@lenobahamas.com

Website: www.lenobahamas.com