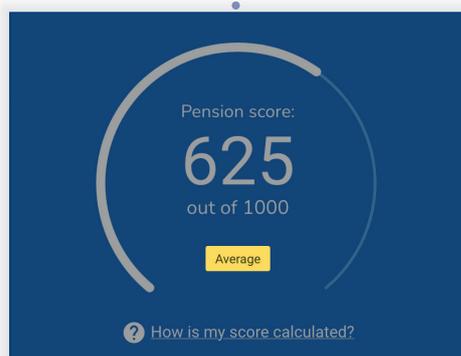
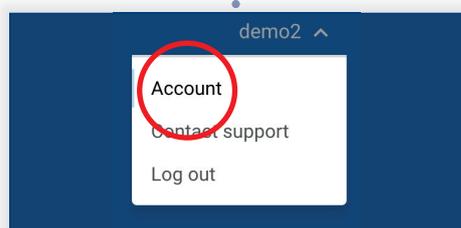
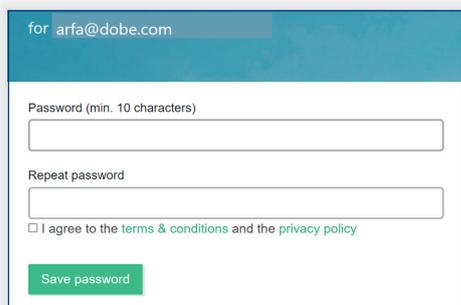


Wingate Engage: Getting Started



Create your account

1. Click on the link contained within your unique **'Invitation to Enrol'** email.
2. Create a **10 character** password then review and agree the site's Terms and Conditions
3. You now have access to your account
4. In the top right corner by your username click the **v** and select **Account**
5. Check your details are correct and:
 - a. input your target **Retirement Age** if different to the age showing
 - b. on the left-hand menu select **'Target Income'** and input your target retirement income figure. You may find this website useful <https://www.retirementlivingstandards.org.uk/#tell-me-more> when choosing your target retirement income.

These can be changed at anytime in the future.

Your account is now set up and you're ready to go!

Your Engage Pension Score

Your pension score is a measure of 3 elements:

1. The completion of your **Profile** (see below)
2. How 'on track' you are to achieve your target retirement income at your target retirement age, and;
3. How often you access your account to update your profile, review the latest articles and book a pension review.

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2022.05 V1

Wingate Engage: Getting Started

Pensions

AVIVA SCOTTISH WIDOWS Standard Life

£115,067.00
Total value

Add a Pension

To get the most value out of your Wingate Engage account you need to have set up online access with your existing pension providers. This allows your dashboard to show the current value of your pensions and the forecasting tool to use these in its projections.

If you haven't yet set up online access with any of your pension providers, where this is possible Wingate Engage includes a link direct to the page on your provider's website for you to do so. It only takes a few minutes to set up online access.

If you don't want to set up online access with your pension providers, you can input the last known value of your pensions manually and update this as you wish going forward.

Pensions

+

Add a pension

AVIVA
Aviva
www.aviva.co.uk

Please enter your Aviva login credentials.

Username – Aviva

Password

Pension value

£ 5,421.00

Submit

Help me find my pensions
(this will open a new tab showing the Government Pension finder)

1. Add your workplace pension by clicking on the **'Add a pension'** tile
2. Select the pension provider
3. Link your Workplace Pension to your Wingate Engage account by inputting your online access username and password. This link enables Wingate Engage to show your current pension valuation on your dashboard.

OR

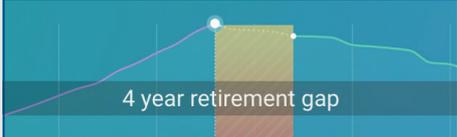
4. Add any other pensions you may have in the same way as described above.
5. If you can't find details of a pension you think you have, click on the **'Help me find my pensions'** link

Once you have added a pension to your account you can use the Timeline forecasting tool.

Wingate Engage: Getting Started

Timeline

Are you on track?



4 year retirement gap

£ ↔ %

Tell me more

Annual Growth Rate	5	%
Annual inflation rate	3	%
Tax-free cash	25	%
Life Expectancy	93	

Profile

Complete your profile



75% complete

Latest content

Ask a question

Book my review

Timeline Forecasting Tool

Retirement goals: You can amend your target retirement age and/or annual retirement income using the +/- buttons.

Pay more in: See what difference additional contributions could make. Use the **'£/% button'**, to switch between £'s per month or %age of salary.

If you want to proceed to make a change to your contribution, click the **'Tell me more'** button to get more details. If you decide to proceed you can send an instruction directly to your employer.

Advanced options: You can change the forecasting assumptions to make this more personal to you.

For example, you can include taking a percentage of your pension as a lump sum at retirement or, change the expected rate of investment growth.

Profile Section

This is a checklist for you to complete to ensure the information about you is up to date and to help you regularly review the important areas relating to your pensions.

As you update each checklist item your Pension Score will increase.

Latest content

Click on this button to access short videos and articles designed to help you better understand your pensions and the choices you have.

Ask a question

Click on this button to send your questions directly to the team of pension specialists at Wingate, your Workplace Pension advisers.

Book my review

Click on this button to request a (free to you) pension review meeting with a pension specialist at Wingate.

