



DIOCESE OF BOISE

retirement_{FOCUS}

May 31, 2022

Re: Diocese of Boise Pension Plan Administration

The Diocese of Boise recognizes that financial security is a primary concern for all of us, and while we must provide for our needs and enjoyment during the active years, we must also plan for our years of retirement. Because of the high value placed on these benefits, it is critical that you understand them and have access to information when you need it. That's why we've been searching for a new partner to help administer the Diocese of Boise Pension Plans.

We are pleased to announce that we have chosen Retirement Focus, managed by USI, to support and administer our plans. Their high-quality customer service will make sure you have the information and support you need as you make decisions about your retirement benefits. The Diocese of Boise plans will go 'live' with call center support and the Retirement Focus suite of online tools on **June 1, 2022**. You will also be able to access Retirement Focus to view or model your pension benefits at www.RetirementFocus.com.

The accompanied brochure outlines the services Retirement Focus provides and will help you understand your role in the process. If you have any questions about your pension benefits or any of the information in the inserted brochure, you can contact the Retirement Focus Service Center at 855.874.0021. Representatives are available 6:00 am to 6:00 pm MDT Monday through Friday.

Sincerely,

Charles Lawrence
Director of Finance

A handwritten signature in blue ink, appearing to be 'Charles Lawrence', written over a faint dotted line.

As a participant in your employer's defined benefit pension plan you have access to the Retirement Focus Service Center – a secure customer service center that helps you access your account information.

RetirementFocus.com

You can reach www.RetirementFocus.com from any computer with a secure Internet connection. On the website, you can:

- **Stay up-to-date on your account information.** See a snapshot of your personal information, such as name and address as well as your current accrued benefit.
- **Model retirement savings projections.** Build your personal plan for retirement by modeling Total Retirement Benefit projections, including your estimated Social Security benefits, other retirement plan assets, and any other sources of retirement savings you may have. Or, model an estimated projection of only your Pension Plan benefit.
- **Learn more about your Pension Plan.** Get answers to some of the most frequently asked questions about the Pension Plan, review summary plan material, and access related resources.
- **Elect to begin your retirement benefits.** When you are ready to initiate your Pension Plan benefits, you can use the online retirement election tool.

Retirement Focus Phone Line

In addition to the RetirementFocus.com website, you have access to Retirement Focus through the toll-free number to make changes to your personal information or initiate your retirement. The Retirement Focus phone line is available Monday through Friday, from 6:00 a.m. through 6:00 p.m. MDT at **855-874-0021**.

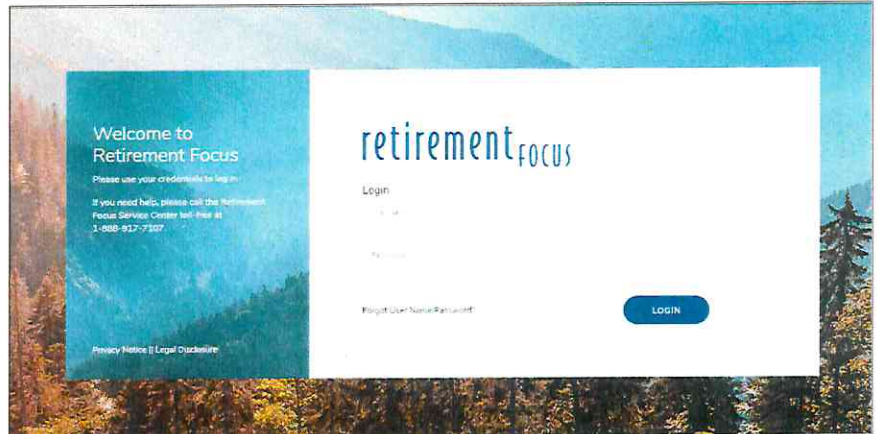
Follow the instructions in this guide to manage your account through the Retirement Focus Service Center.

(Please note: screenshots are for illustrative purposes. Once you login, your screens may differ slightly due to the options available in your retirement plan.)

RetirementFocus.com

From any computer with a secure Internet connection, enter www.RetirementFocus.com.

If you have not yet logged in to Retirement Focus, enter your initial user name (your Social Security Number with no dashes) and initial password (your birth date as MMDDYY) under Participant Login. Once you log in, you will create your permanent user name and password. In addition, you will create a Secret Q&A, which you can use if you need to reset your Login information.



My Account

Once you log in, the My Account section includes your personal information, including your employment and compensation history, and your accrued benefit amount (payable at your Normal Retirement Date) if you were to retire today.

HOME	MODELING	RETIREMENT	MATERIALS	LINKS	GLOSSARY	FAQS
MY ACCOUNT Manage Your Information						
The My Account page provides a summary of your employer and personal information including historical compensation and service. If you have retirement benefits with more than one employer in our system, the information on this page is for the employer that is currently active.						
RETIREMENT FOCUS ACCOUNT DETAILS						
Email Address	dbdctest@findleydavies.com					
User Name	999999904					
Password	< Hidden >					<input type="button" value="UPDATE"/>
Secret Question	what is my favorite color?					
Secret Answer	< Hidden >					
PERSONAL INFORMATION			COMPENSATION AND SERVICE HISTORY			
Sam D. Sample			DEMO - ABC Final Average Pay Plan			
123 Main St, Toledo, OH 43604			DATA AS OF THURSDAY, MARCH 31, 2016			
			PLAN YEAR	COMPENSATION	HOURS	
			2013	\$122,317.65	2,080.00	
Social Security Number	XXX-XX-9904		2012	\$118,755.00	2,080.00	
Date of Birth	1/12/1954		2011	\$117,935.00	2,080.00	
Date of Hire	1/1/1990		2010	\$114,500.00	2,080.00	
Date of Termination	12/31/2013		2009	\$111,350.00	2,080.00	

Logging Out

Be sure to click the Log Out button in the upper right-hand corner when you are finished to ensure the highest level of security.

Benefit Modeling

RetirementFocus.com allows you to model your Total Retirement Benefit based on variables you enter about your anticipated date of retirement and other sources of retirement income.

Begin by clicking the Modeling link in the top navigation menu or the Get Started button from the home page. Then enter general assumptions such as your current pay, expected pay increase percentage, anticipated rates of returns, and information about your other retirement savings.

To model only your Pension Plan benefit using fewer variables, click the "In a Hurry" link.

When you click in each of the fields to enter your assumptions, you will see a detailed description of each of the assumptions.

Once you click "Project Benefits", your projected annual income will display, showing the estimated income you will receive from each of your retirement savings sources each year.

NEW

Initiate Retirement Online

When you are ready to initiate your retirement and begin receiving Pension Plan benefit payments, click the "Get Started" link on the Home page.

Ready to start receiving your benefit?
Get started now with our step-by-step, online retirement election tool!

Get Started!

- Verify your address.
- Provide details on your retirement timeline, such as dates of termination and when to begin benefits.
- Elect whether you want to complete the process online or request retirement forms.

You may need to gather some documents to reference while you complete online retirement. The online retirement request process through Retirement Focus will guide you through all the steps to complete your election. Examples of the steps include electing optional benefit forms, indicating withholding amounts, providing direct deposit information and designating rollover elections.

MONTHLY OPTION CHOICE (RIS Form W-4P must be completed)	Monthly Benefit Starting on 5/1/2016
<input type="radio"/> Single Life Annuity [What's This?]	\$1,552.50
<input type="radio"/> Life Annuity with 60 Months Certain [What's This?]	\$1,535.79
<input type="radio"/> Life Annuity with 120 Months Certain [What's This?]	\$1,492.98
<input type="radio"/> 50% Joint and Survivor [What's This?]	\$1,481.31
<input type="radio"/> 75% Joint and Survivor [What's This?]	\$1,448.12
<input type="radio"/> 100% Joint and Survivor [What's This?]	\$1,416.37

NEW

Upload Your Forms

You can save forms right on your personal Retirement Focus page. Select My Uploads from the home page and follow the instructions to securely send documentation to the Retirement Focus Service Center.

Need Help?
Contact the Retirement Focus Service Center at **855-874-0021** Monday through Friday from 6:00 a.m. through 6:00 p.m. MDT if you have additional questions about your Pension Plan or to initiate your retirement.