

Retirement Planner: Active Members Portal

Version 2025.5

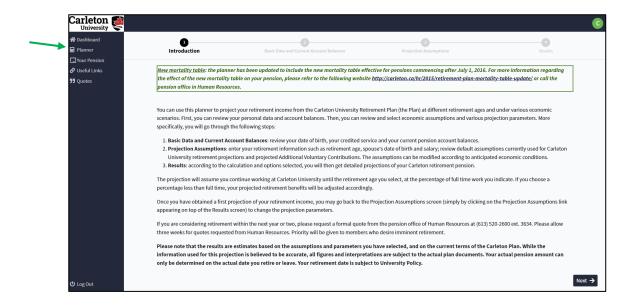
Carleton University



RETIREMENT PLANNER

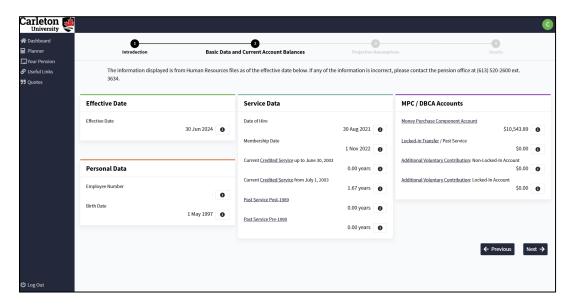
The **Planner** is designed to help you plan for your retirement by estimating your projected retirement income from the Plan according to your personal information and selected economic assumptions and projection parameters. Each page contains glossary item links and helpful tips.

Review the Introduction and click Next.



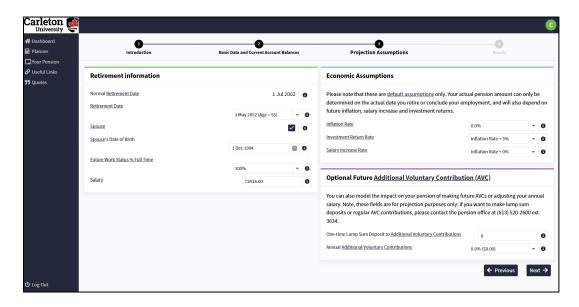
BASIC DATA AND CURRENT ACCOUNT BALANCES

This information is from your Human Resources files as of the **Effective Date**. Review your information and, if everything is correct, click **Next** to proceed. If anything needs to be corrected, please contact the pension office at the number located at the top of the page.



PROJECTION ASSUMPTIONS

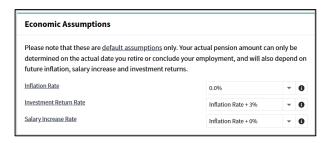
Here you can enter your retirement information and select economic assumptions and projection parameters.



Step 1: Review and, if desired, modify your **Retirement Information.**



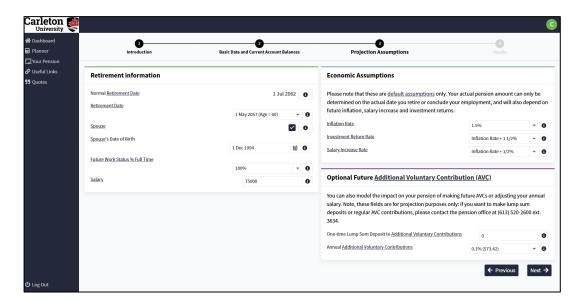
Step 2: Review and, if desired, modify the **Economic Assumptions.** The default assumptions are the ones currently used for Carleton University retirement projections.



Step 3: Review and, if desired, modify projected Optional Future Additional Voluntary Contributions (AVC).

Optional Future Additional Voluntary Contribution (AVC)		
You can also model the impact on your pension of making future AVCs or adjusting your annual salary. Note, these fields are for projection purposes only: if you want to make lump sum deposits or regular AVC contributions, please contact the pension office at (613) 520-2600 ext. 3634.		
One-time Lump Sum Deposit to <u>Additional Voluntary Contributions</u>	0	0
Annual Additional Voluntary Contributions	0.0% (\$0.00)	· 6

Step 4: Review to confirm your selections and click **Next** to view your retirement projection and save your quote.



RESULTS

Here you can view and print the detailed projection of your Carleton retirement pension.

You can change your **Retirement Date**, which will immediately run a new projection.

You can also click any of the navigation links at the top to return to a page to review and/or modify selections to run additional projections.

All projections are saved as quotes, which can be viewed and printed from the **Quotes** section.

