

GEMINI Collective Foundation

## CONNECT FOR MEMBERS INSTRUCTIONS

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# 1 Purpose

Connect is the member portal of the GEMINI Collective Foundation (hereinafter referred to as Foundation).

This document presents the processes handled by the Connect portal and describes the functions of the portal.

## 2 General points

### 2.1 Homepage and navigation

The Connect homepage provides helpful information and links along with details of your designated contact person at the Foundation.

The header at the top of the screen lists various functions as well as your documents and settings.

#### 1. Navigation

Use the menu symbol to show and hide the navigation column on the left margin of the screen.

#### 2. Logo

Click on the logo to return to the homepage.

#### 3. Tasks

Here you can see the changes and messages you have made or saved temporarily. Use various filter criteria to help you find the relevant tasks. A double-click allows you to call up and edit your temporarily saved changes and messages.

#### 4. Messages

All your documents are listed in chronological order. Filter criteria help you find specific documents. If a new document arrives, you will receive an automatically generated e-mail from [noreply@avadis.ch](mailto:noreply@avadis.ch) with the subject line "New information in your Connect".

#### 5. Three-dot menu

Click on your user name or the three-dot menu to open your user profile or log out of Connect. Details regarding the user settings can be found in the "user profile" chapter.

## 2.2 User profile

You can edit your user settings in the user profile.

### **Edit your user name and language setting**

Click on the "Edit" button to change your user name and the language setting in Connect. Please note that these changes will only be activated the next time you log in.

### **Change your password**

Click on "Change password" to create a new password.

### **Change your e-mail address**

Click on "Change e-mail address" to register a new e-mail address.

### **Multi-factor authentication**

For security reasons, logging into Connect requires two-factor authentication. You can change the method selected at the first login, for example from text message to Authenticator, in your user profile.

## 2.3 Favourites

Click on the star to mark frequently used menu items as favourites. These items will be listed above the navigation to help you find them more easily. To deactivate favourite status, click on the star again.

## 3 Overview

The "Overview" menu contains details regarding your personal data. You can enter a change of address and submit it directly, or view your current benefits and contributions. Use the contact form to notify the Foundation of any queries you may have, or to exchange documents.

### 3.1 My data

This section provides you with information regarding your social security number, date of birth and address on file with the Foundation.

### 3.2 Benefits and contributions

This section provides an overview of your salary amount, the amount of your retirement assets, the registered employment level and the expected retirement benefit at regular retirement age. Select "Show details" to see your entitlement in the event of disability or death.

If you click on "Retirement options", you can see the calculated retirement benefits (retirement capital/annual pension) for early and deferred retirement (58-70).

Click on "Contributions" to see the amount of contributions currently payable to the Pension Fund. These are broken down into employee/employer contributions as well as savings and additional contributions.

### 3.3 Contact form

Use this form to submit any queries you may have, and to send us documents.

## 4 Simulations

Under "Simulations" you can run a non-binding analysis of how a change in your salary, a switch to a different savings plan or a repayment of your advance withdrawal for home ownership will affect your retirement benefits. In the "Multi-level simulations" menu, you can simulate various scenarios together by clicking on the "New" button.

## 5 Enquiries

Under "Enquiries" you can simulate how your retirement benefits will change if your circumstances change. You can also send us a binding application directly via Connect.

### 5.1 Buy-in

In this section you can calculate how a buy-in will affect your future benefits by entering the buy-in date and the planned buy-in amount.

The "Max. buy-in" and "Max. buy-out" fields change when you change the date of your planned retirement.  
Max. buy-in: Maximum buy-in option for retirement at age 65.

Max. buy-out: Additional buy-in option in the event of early retirement. Click on "Calculate" to see your retirement benefits before and after the buy-in.

See "Flexible retirement" for your benefits in the event of early retirement.

Click on the "Self-declaration" button to fill in the questions, enter your bank details and tick the disclaimer box. Then confirm everything and submit.

### 5.2 Retirement

Simulate your retirement by changing the date and/or level of retirement. Choose between capital and/or a regular pension and calculate your future benefits.

### 5.3 WEF pledging

Do you want to pledge your vested benefits to take advantage of better financing terms for your home? Click here to submit an application to your Pension Fund via Connect.

### 5.4 WEF advance withdrawal

If you have already simulated your early withdrawal under "Simulations" and would like to send us your binding application, please complete the "Advance withdrawal for home ownership" process.

## 6 Changes

### 6.1 Change of address

Are you moving? You can notify the Foundation of your new address and your move-in date using the "Valid from" button. Please remember that you also have to report your new address to your employer!

### 6.2 Beneficiaries

If you would like to name your partner as a beneficiary, please notify us using the forms "Entitlement to a partner's pension" and "Beneficiaries of lump-sum death benefit".

You can enter the details of the beneficiaries and submit the forms.