

#### Zalamea Retirement Account SSO Registration (External) Inbox ×



do-not-reply to Sample -

#### Hi Mr. Sample Employee11,

We have successfully created your account and is now avaiable for viewing.

Please click on the link below to complete the Registration.

#### https://demo.uat.zalamea.ph

In case the Link does not work, try to copy and paste the link on the address bar of your browser.

For questions and concerns, please contact support@zalamea.ph

Thanks!

Zalamea Team

Employees will receive the Single Sign On Registration email.

Click on the Link to access the portal.

#### **Registration Link**



#### Welcome!

Manage your retirement account, check balances, and monitor investments easily!

Need help? email support@zalamea.ph.

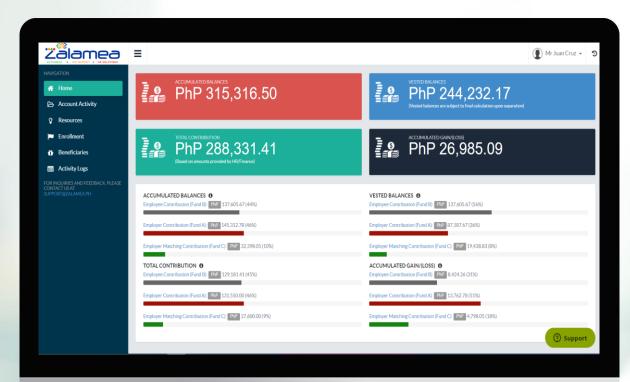
#### Login Account

✓ I have read and agree to the <u>Privacy</u> <u>Policy of Zalamea</u>

Sign in with Active Directory

### Click "Sign in with Active Directory".

Please ensure you are logged in through your <u>@spglobal.com</u> ID to log into the Zalamea Portal.



ZALAM

Employee Dashboard shows the overview of the Employee Balances and Vested Benefit.

#### Dashboard

zalamea	≡							Mr Juan Cruz 👻	ື
NAVIGATION									
A Home	Acco	ount Activity						Export	
Account Activity									
Resources	Fund Type Transaction Description								
🛤 Enrollment	Fund Type						•		
Beneficiaries	Transaction Date								
Activity Logs	Transaction Date								
FOR INQUIRIES AND FEEDBACK, PLEASE CONTACT US AT SUPPORT@ZALAMEA.PH	Transaction Date	Fund Type	Transaction Description	Beginning B	lalance (PhP)	Amount (PhP)	Accumulated Balance (PhP)	Remarks	
	09/30/2022	Employer Matching Contribution (Fund C)	Gain/Loss	PhP 315,04	41.00	PhP 275.50	PhP 315,316.50		
	09/30/2022	Employer Contribution (Fund A)	Gain/Loss	PhP 314,73	31.06	PhP 309.94	PhP 315,041.00		
	09/30/2022	Employee Contribution (Fund B)	Gain/Loss	PhP 314,4	55.56	PhP 275.50	PhP 314,731.06		
	09/30/2022	Employer Matching Contribution (Fund C)	Contributions	PhP 313,3	55.56	PhP 1,100.00	PhP 314,455.56	Contribution	
	09/30/2022	Employer Contribution (Fund A)	Contributions	PhP 311,7	05.56	PhP 1,650.00	PhP 313,355.56	Contribution	
	09/30/2022	Employee Contribution (Fund B)	Contributions	PhP 308,9	55.56	PhP 2,750.00	PhP 311,705.56	Contribution	
	08/31/2022	Employer Matching Contribution (Fund C)	Gain/Loss	PhP 308,6	80.06	PhP 275.50	PhP 308,955.56	⑦ Support	

Employee Account Activity shows the detailed transactions posted to each ledger.

# **Account Activity**

	≡			Mr Juan Cruz 👻	Q
NAVIGATION					
🕆 Home	Reference				
Account Activity					
Resources					
Enrollment	Documents			0 .	~
Beneficiaries	Document Name	Document File	Description		
FOR INQUIRIES AND FEEDBACK, PLEASE	FAQs	FAQ (1).pdf			
FOR INQUIRIES AND FEEDBACK, PLEASE CONTACT US AT SUPPORT@ZALAMEA.PH	Showing 1 to 1 of 1 entries			Previous 1 Next	
					_
				(?) Support	

Resources tab is where the employees can view Pension Plan-related documents like the FAQs.

#### **Resources**

2					
	Ξ			Sample Account 👻	ອ
NAVIGATION					
🚓 Home	🔎 Enrollme	ent			
Account Activity					-
🃁 Enrollment	Good Day!				
Beneficiaries			PINES, INC. Retirement Plan has begun. You can now choose a		
🔲 Activity Logs	from S&P GLOBAL PHIL		icable. Your accumulated contributions plus any earnings will I	form part of your retirement benefit upon your retirement	
FOR INQUIRIES AND FEEDBACK, PLEASE CONTACT US AT SUPPORT@ZALAMEA.PH		where you nominate an amount of your monthly so ne for your added benefit at your retirement.	salary, which will be deducted from your payroll for contribution	on into your retirement savings account for the purpose of	
		ntary Contribution Amount, check the tick box b e your contribution amount any time within this	elow and click "SUBMIT" at the bottom. Kindly note that your period:	enrollment period is from May 01, 2023 to May 31, 2023, so	
	Select	Voluntary Contribution Amount	Deduction Start Date	Deduction End Date	
	۲	PhP 500			
	0	PhP 1000			
	0	PhP 1500			
	0	PhP 2000			
	0	PhP 2500			

PhP 3000

PhP 3500

Employees can enroll to the Employee Voluntary Contribution program by choosing their preferred amount. Enrollments are done annually. Only new members are allowed to enroll mid-year.

(?) Support

Enrollment

0	PhP 17000
0	PhP 17500
0	PhP 18000
0	PhP 18500
0	PhP 19000
0	PhP 19500
0	PhP 20000

#### By choosing a specific amount herewith:

 If an authorizing the company to deduct a portion of my net semi-monthly salary based on my chosen amount from June 2023 to April 2024 on a semimonthly basis. These deductions will represent my voluntary contributions to the Retirement Fund, in accordance with the rules and regulations of the Retirement Plan.

Indirestant that when the portal closes, my decision is final and the deductions will be applied on my payroll until the scheme year ends. I understand
that I would have to wait for the next scheme year to be able to change my nominated voluntary contribution amount or not renew my voluntary
contributions.

 In any case that my net semi-monthly salary is not sufficient to cover the semi-monthly contribution deduction on a certain payout date due to different reasons (i.e. unpaid leaves, etc.) I accept that I have already missed the contribution applicable on that pay cycle. I also accept that there will be no retracactive voluntary contributions for previous pay cycles.

 In case I will go on sabbatical leave or prolonged unpaid leave for more than 1 month, I understand that there will be no voluntary contributions that will be deducted from myofil. I also accel that there will be no retractive voluntary contributions on pay cycles where I will not be receiving compensation. The deductions will resume when I return to normal payroll.



Agree with the Terms and Condiitons by checking all the tick boxes.

#### Then click Submit.

#### ⑦ Support

#### Enrollment

	Ξ						Mr Juan Cru
NAVIGATION	() Beneficiaries						Cancel Sa
Account Activity Resources	Full Name *	Percentage of Benefit *		Email Address	Contact Number		
FireSources	Maria Dela Cruz	50	%	Email Address	Contact Number	0	
<ul> <li>Beneficiaries</li> </ul>	Full Name "	Percentage of Benefit *		Email Address	Contact Number		
Activity Logs	John Dela Cruz	50	%	Email Address	Contact Number	•	0
FOR INQUIRIES AND FEEDBACK, PLEASE CONTACT US AT SUPPORT@ZALAMEA.PH							
							() su
SUPURISCLAMEAN							(?) su
							() Sup
SUPURISULAMEANT							() Suj

Employee can nominate their beneficiaries and the corresponding percentage for each beneficiary, if necessary.

Updating can be done anytime during the year as necessary (i.e. marriage, etc.)

# Nomination of Beneficiary

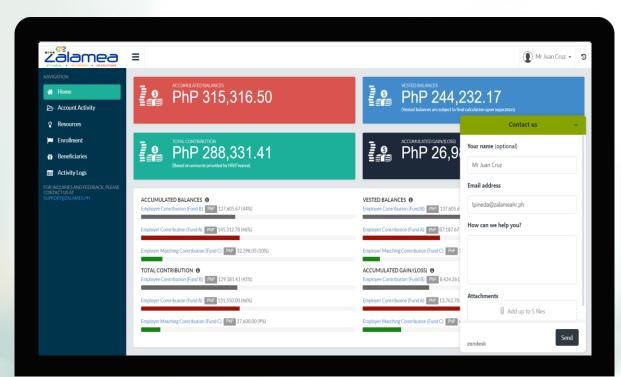
	=					🜘 Mr Juan Cruz 👻
Home	Activity L	.ogs				
Account Activity	<u> </u>	U				
Resources	Show 10 v ent	ries				Search: 02/09/2023
Enrollment	Activity Time	User	Module	Action/View	Item Summary	IP Address
Beneficiaries	02/09/2023 10:28AM	Juan Cruz	Beneficiaries	List View		175.176.19.178
Activity Logs	02/09/2023 10:27AM	Juan Cruz	Beneficiaries	List View		175.176.19.178
UIRIES AND FEEDBACK, PLEASE IT US AT T@ZALAMEA.PH	02/09/2023 10:26AM	Juan Cruz	Resources	Record View	Reference	175.176.19.178
	02/09/2023 10:25AM	Juan Cruz	Ledgers	Account Activity Vie	w	175.176.19.178
	02/09/2023 10:24AM	Juan Cruz	Home	Dashboard		175.176.19.178
	02/09/2023 10:24AM	Juan Cruz	Users	Login	Mr Juan Cruz	175.176.19.178
	02/09/2023 10:24AM	Juan Cruz	Users	Logout	Mr Juan Cruz	175.176.19.178
	02/09/2023 10:24AM	Juan Cruz	Home	Dashboard		175.176.19.178
	02/09/2023 10:24AM	Juan Cruz	Users	Login	Mr Juan Cruz	175.176.19.178
	Showing 1 to 9 of 9 entr	ies				Previous 1 Next
						() Support
						C Support

 $\bullet \bullet \bullet \bullet$ 

ZALAM

Activity Logs are in place for additional security to the User's access.

# **Acitivity Logs**



# Support is available on the platform for employee inquiries.

## **Support Facility**



	=	🜘 Mr Juan Cruz 🗸 💈
NAVIGATION		
🖶 Home	Mr Juan D Cruz	Account Activity
Account Activity		
Resources	Employee No. 0	Status 0
📁 Enrollment	101	Active
👸 Beneficiaries	Date Hired  0 03/01/2016	
Activity Logs	Years of Service (9	Credited Service Year 🛛 🖲
FOR INQUIRIES AND FEEDBACK, PLEASE CONTACT US AT	6 years and 11 months	6 years and 11 months
SUPPORT@ZALAMEA.PH	Username 0	Email Address 0
	101	lpineda@zalameahr.ph
	Birthdate	Age 0
	09/17/1989	33
	Office No.	Mobile No.
	Home No.	Alternate No.
	Primary Address	Alternate Address
	Department	Position
	MARKETING - FIELD MARKETING	Employee
	Sex	③ Support
	Male	

Employee Profile shows the details for each employee.

Employee details are based on Workday profile. Any personal information changes done in Workday will be updated in the Zalamea portal.

### **Employee Profile**

Contribution Rate ()		Contribution Rate Changed			
3		01/19/2023 10:17AM			
TIN					
Total Contribution					^
Accumulated Gain/(Loss)					^
Accumulated Balances					^
Vested Balances					^
Individual Employee Report					o ¥
As of Date	Report File		Report Status	Created At	
09/30/2022	IndividualEmployeeReport-101.pdf	۲	Completed	11/22/2022 1:47PM	
Showing 1 to 1 of 1 entries				Previous 1	Next
Showing 1 to 1 of 1 entries					
Documents					o ^
					0 ^ 0 ^
Documents					

Individual Employee Report section is where the employees' can download their own Statement of Account in PDF format.

SOA will be available after each quarter. This is system-generated.

# **Employee Profile**

za	lamea	
ACTUARIAL	· RETIREMENT · HR SOLUTIONS	

ZALAMEA BUSINESS SOLUTIONS, INC. 15F Cilyans 13 Tower 2. 154 H.V. Dela Costa St., Salcodo Village Makati City, Philippines 1227 T: 8156073 E: seport@zalkmea.ph W:-www.zalkmea.ph

#### STATEMENT OF MEMBER'S EMPLOYER ACCUMULATED VALUE

#### ABC For the period Jun. 01, 2020 to Jun

ZALAM

For the period Jun. 01,	2020 to Jun. 30, 2020			
Last Name	Reyes		Period Beginning	Jun. 01, 2020
First Name	Leslie		Period Ending	Jun. 30, 2020
Department	π		Period Covered	1 month
Employee Number	041		Years of Service	10 years and 1 month
Date Hired	05/03/2010			
Age	33 years			
Employee Contributio	ns Accumulated Value			101,863.68
Vested Benefit Percer	stage			100.00 %
Vested Benefit				101,863.68
Employer Contribution	ns Accumulated Value			160,882.53
Vested Benefit Percer	tage			50.00 %
Vested Benefit				80,441.25
Employer Matching C	ontributions Accumulated Value			73,300.46
Vested Benefit Percer	stage			50.00 %
Vested Benefit				36,650.23
Total Vested Benefit				218,965.17
1.) Member's Employ	ee Contributions Accumulated Value		2.) Contributions for t	the Period
GainLoss		8,607.42	Total Contributions,	lun. 01, 2020 90,799.86
Contributions		90,799.86	Contributions for the	Period
Forfeitures		0.00	June, 2020	2,128.12
Withdrawals		0.00	Total Contributions J	un. 30, 2020 92,927.96
Beginning Balance		99,407.28		
GainLoss		328.28		
Contributions		2,128.12		
Forfeitures		0.00		
Withdrawals		0.00		
Balance for the period	1	2,456.40		

# Individual Employee Statement

# **Employee Statement**



# Thank you!

in f

www.zalamea.ph