Western Pension Plan
Step by Step: Changing Investments Online

We are pleased to offer you the convenience of making changes to the investment allocation of your account(s) quickly and easily using a secure online system. The deadline for making investment changes is the 25th of the month to take effect at month-end. You may wish to print this document so you may refer to it as you use the tool.

Logging in to your personal account
1. Go to www.uwo.ca/hr. In the top right hand corner, select Pension Account and login.
2. To continue, type in your Username and Password, select login.
3. If you need to confirm your User ID and Password, please call the ITS Helpdesk at 519-661-3800, Option #1, and then Option #2. You will need to provide your Western Pension ID number (in most cases this will be your Western identification number).

View Your Current Elections
To view your account balances and the current investment allocation for the money accumulated in your account(s), select “Balances” from the navigation menu.
To view which specific investment fund(s) that are elected for your Future Contributions (new monies coming into the pension account) please go to “Pension Investment Allocation Future”
Change the Investment of the Accumulated Account(s)- use this to change the investment allocation of your current account balance for one or all of your pension account(s).

1. Click “Transactions” from the menu on the left.
2. Click “Pension Investment Allocation Accumulated”
3. Under Plan, use the pull down menu to select the plan “Academic or Administrative”, and then under Moneyset select the account: Regular –for regular account or Voluntary –for the voluntary account that you wish to change.
4. Type your new fund percentages to a total of 100%.
5. Click “submit transaction”
6. Review your choices. If you need to make a change, select “back”; otherwise, click “submit transaction”. A confirmation number will appear on the screen. Please make note of this number or print the page.

Do you have more than one account?
If you wish to change the investments for more than one account you will need to follow steps 1 to 6 for each applicable account: Administrative “Regular” and “Voluntary” account and or Academic “Regular” and “Voluntary” account. If you do not know which accounts you have funds invested in, review your “Balances” where each account is named and the holdings are displayed.
**Change the Investment Source used for Future Contributions** - use this to change the investment direction of any future contributions going into the plan, new monies deducted from your pay and Western contributions.

7. Click “Transactions” from the menu on the left.
8. Click “Pension Investment Allocation Future”.
9. Under Plan, use the pull down menu to select “Academic” or “Administrative”, and then under Moneyset select the account: “Regular” or “Voluntary”.
10. Type your new fund percentages to a total of 100%.
11. Click “submit transaction”.
12. Review your choices. If you need to make a change, select “back”; otherwise, click “submit transaction”. A confirmation number will appear on the screen. Please make note of this number or print the page.

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**Do you have more than one account?**

If you wish to change the future investments for more than one account you will need to follow steps 7 to 12 for each applicable account: Administrative “Regular” and “Voluntary” account and or Academic “Regular” and “Voluntary” account. If you do not know which accounts you have funds in, review your “Balances” where each account is named and the holdings are displayed.

Congratulations! Your changes will be taken on the 25\(^{th}\) of the month and implemented at the end of the month.

13. When you are completely finished, select “logoff” from the menu on the left.

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**Did you change your mind?**

After submitting your changes using the above steps, a “Pending Transaction” is created and held until the processing deadline (the 25\(^{th}\) of the month). Prior to this deadline, you may log back in to your account, where you can view, delete or delete and replace your instructions.

To view or cancel your change to **Pension Investment Allocation Accumulated** (steps 1-6), under “Transactions” select “Pending Pension Investment Allocation Accumulated”. Select “+” beside the confirmation number to view the details of the transaction and reveal the option to ‘Delete’.

To view or cancel your change to **Pension Investment Allocation Future** (steps 7-12), under “Transactions” select “Pending Pension Investment Allocation Future”. Select “+” beside the confirmation number to view the details of the transaction and reveal the option to ‘Delete’.
If you have any questions or would like to confirm that all transactions have been completed properly please contact the Human Resource Communication Centre at 519-661-2194 or email hrhelp@uwo.ca.