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16 York Street, Suite 3300, Toronto ON M5J 0E6| **myupp.ca**

**Pension Administration and Member Services Transition to UPP**

**Background**

In fall 2024, the administration of pensions and member services is transitioning to UPP. As part of our commitment to supporting members throughout the process, we’ve developed a set of materials organizations can share to help spread the word and help members prepare for the transition.

These materials provide important information to members in an easily digestible format and drives members to a new [Member Experience](https://myupp.ca/members/experience/) page on UPP’s website

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**Speaking points**

*About UPP Member Services transition*

* In fall 2024, UPP will roll out its new member service experience, created using direct insights and input from members.
* This means all UPP members will receive pension-related service and support from UPP’s Member Services team instead of their employers, as many do today.
* One of the main components of the new member service is the myUPP Member Portal, a secure digital platform where members can run pension estimates, update personal information, and interact with UPP’s Member Services team.
* Any member going through a pension-related event during the transition will receive direct support from UPP. UPP will have a list of these members and will reach out to them directly. If you receive any questions from these members, please ask them to contact UPP directly.
* Further details, including information sessions and registration details will be provided throughout 2024.
* Visit the new Member Experience page at myupp.ca/members/experience to learn more.

*About UPP’s Member Service experience*

* Starting in fall 2024, UPP members will receive support from a dedicated team of UPP pension experts.
* From major life events such as changing employers, preparing to retire and planning for loved ones, UPP’s Member Services team will be there to answer questions and provide support.
* Members can reach UPP using their preferred channel:
  + the Secure Message tool in the MyUPP Member Portal,
  + email
  + phone

*About the myUPP Member Portal*

* The myUPP Member Portal is a secure digital platform with a wide range of easily accessible tools, information, and resources.
* Members will have the ability to:
  + plan for the future by running pension estimates for various ages, work statuses, and key dates
  + communicate securely with UPP Member Services
  + receive and return documents securely and electronically
  + update personal information
  + view member information including recent service and pensionable earnings
  + deferred members can submit their pension application request online
  + pensioners can update their banking information and view their payment history

*About UPP*

* University Pension Plan Ontario (UPP) is a jointly sponsored pension plan for Ontario’s university sector.
* UPP currently encompasses 18 university and affiliate organizations, over 39,000 members, and more than $10 billion in assets under management.

*General Feedback Holding Lines*

* Thank you for sharing your insights and comments with us - your feedback will be shared with UPP’s Member Services team.
* If you have further questions about UPP, please visit UPP’s [Frequently Asked Questions page](https://myupp.ca/members/faqs/) or reach out to UPP’s Member Services team at [myupp@universitypensionplan.ca](mailto:myupp@universitypensionplan.ca). by telephone:1-833-627-7877
* We also encourage you to review your Member Handbook and/or Quick Guide, available on the Plan Basics page on MyUPP.ca
* For more information and updates, [subscribe](https://myupp.ca/contact-us/) to UPP’s newsletter, [visit](https://myupp.ca/) MyUPP.ca and [follow](https://www.linkedin.com/company/university-pension-plan-ontario)UPP on LinkedIn.

**Frequently Asked Questions**

**When will I start receiving pension service from UPP?**

UPP will assume pension administration and member services this coming fall. Until then, please continue to reach out to your employer’s Human Resources team with any questions about your pension (unless you are already receiving service directly from UPP). Further details about the transition, including specific dates, will be shared in the coming months via UPP and your employer.

**What isn't changing?**

*Applying for retirement*

If you are an active member of UPP, you will still be required to submit your retirement notice through your employer, who will notify UPP to initiate the development of your pension options package.

*Contributing to your pension*

Your pension contributions will continue to be deducted by your employer, who will report your contributions, pensionable service, and earnings information to UPP.

*Other non-pension related benefits*

Additional benefits such as health, dental, and life insurance are not impacted by this transition and continue to be administered through your regular channels. Any mention of ‘benefits’ from UPP refers solely to your pension benefit.

**Will this impact my annual statement?**

There is no impact to your 2023 annual statement. You will receive your annual statement from your employer, by June 30, 2024. Next year, members will have the ability to view and download their annual statements through the myUPP Member Portal on a go-forward basis.

**If I already have a pension portal from my prior plan, can I use my current log-in credentials?**No, you will need to register for a new account under the myUPP Member Portal.

**When can I register?**

Registration for the portal will begin in Fall 2024. You will receive a communication directly from UPP with an invitation to register and tips to help you explore your new myUPP Member Portal account.

**Who can register for the myUPP portal?**The myUPP Member Portal is available to active and deferred members, and pensioners. Surviving spouses and beneficiaries can also register once they are receiving monthly survivor pension payments.

**I'm planning to retire, who do I submit my notice to?**After the transition, you will still be required to submit your retirement notice through your employer, who will notify UPP to initiate the development of your pension options package.