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User Manual

In alliance with CIMB

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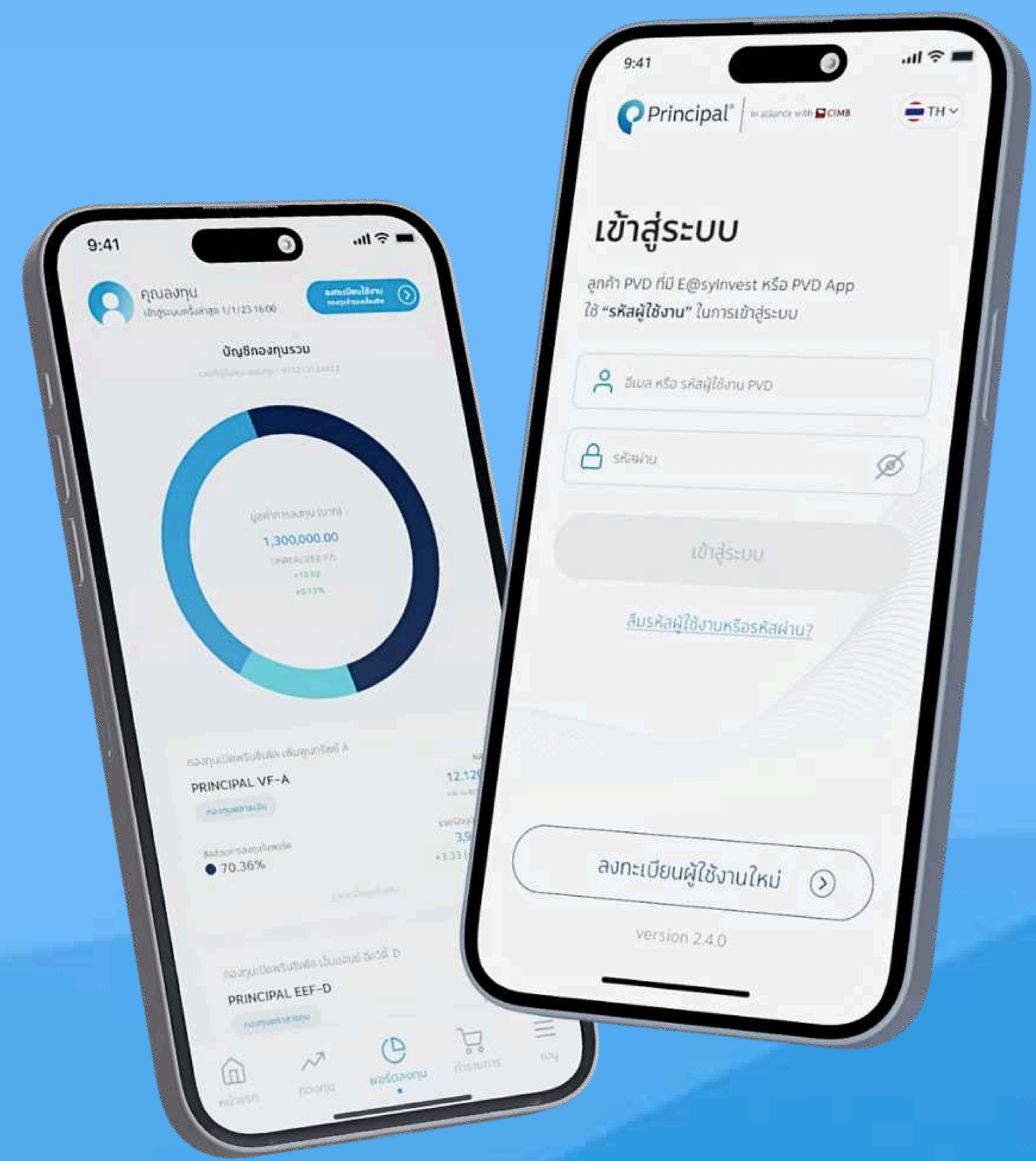

List of contents

Plan Wise Retire Well:
Fill in Information

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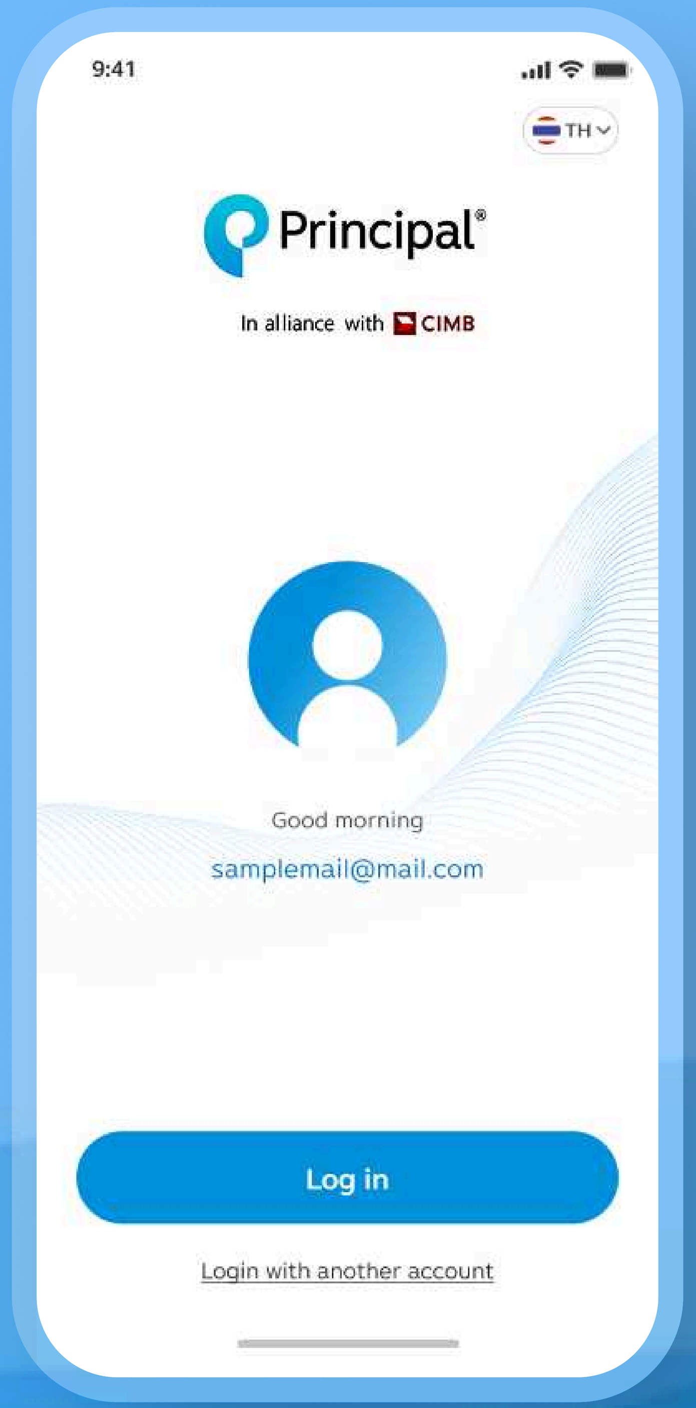
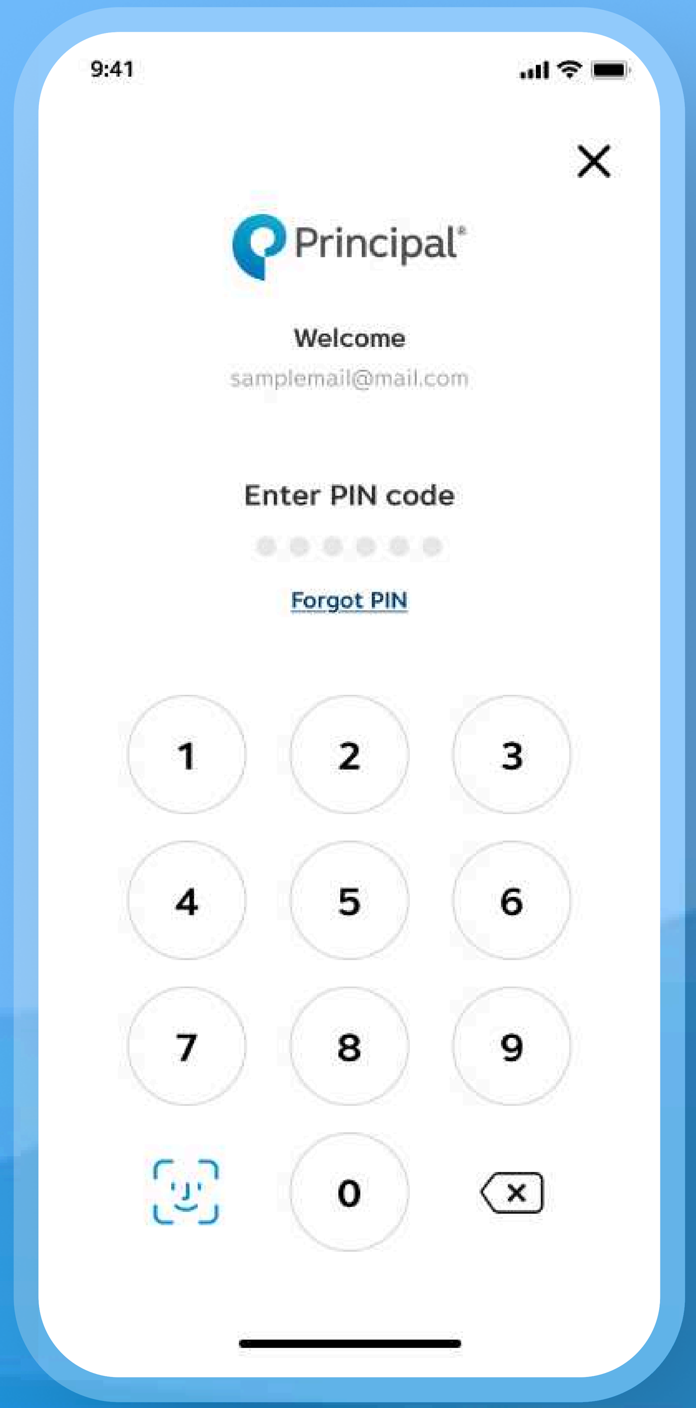
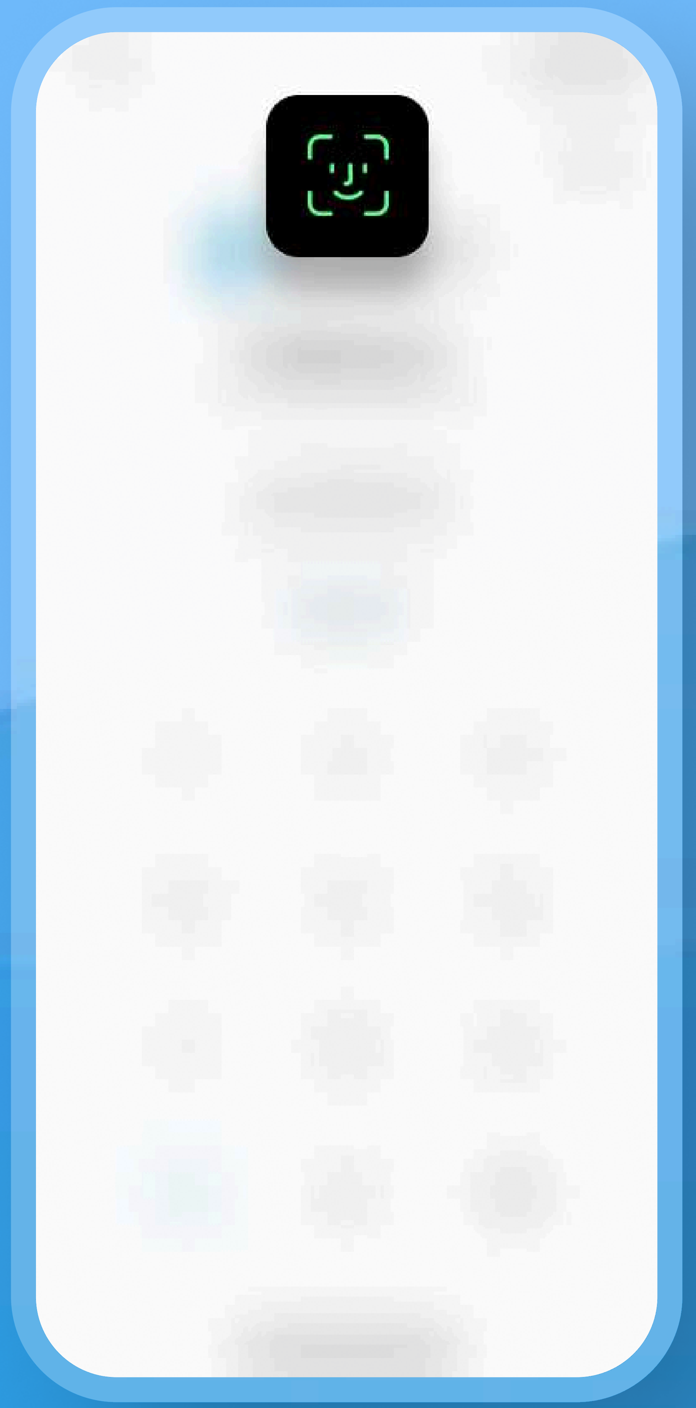
Plan Wise Retire Well



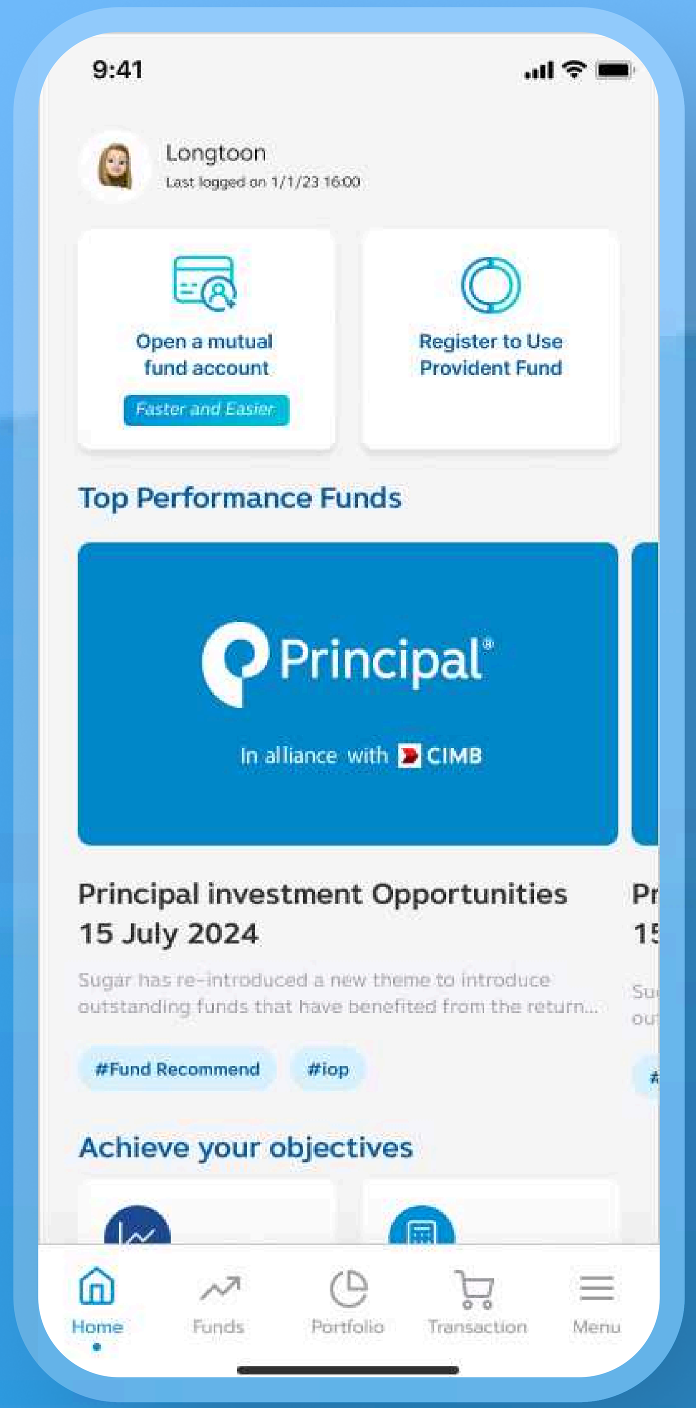
1. You can log in with your account or use another account.



2. If you haven't set up Face ID or fingerprint login, enter your PIN Code to continue.

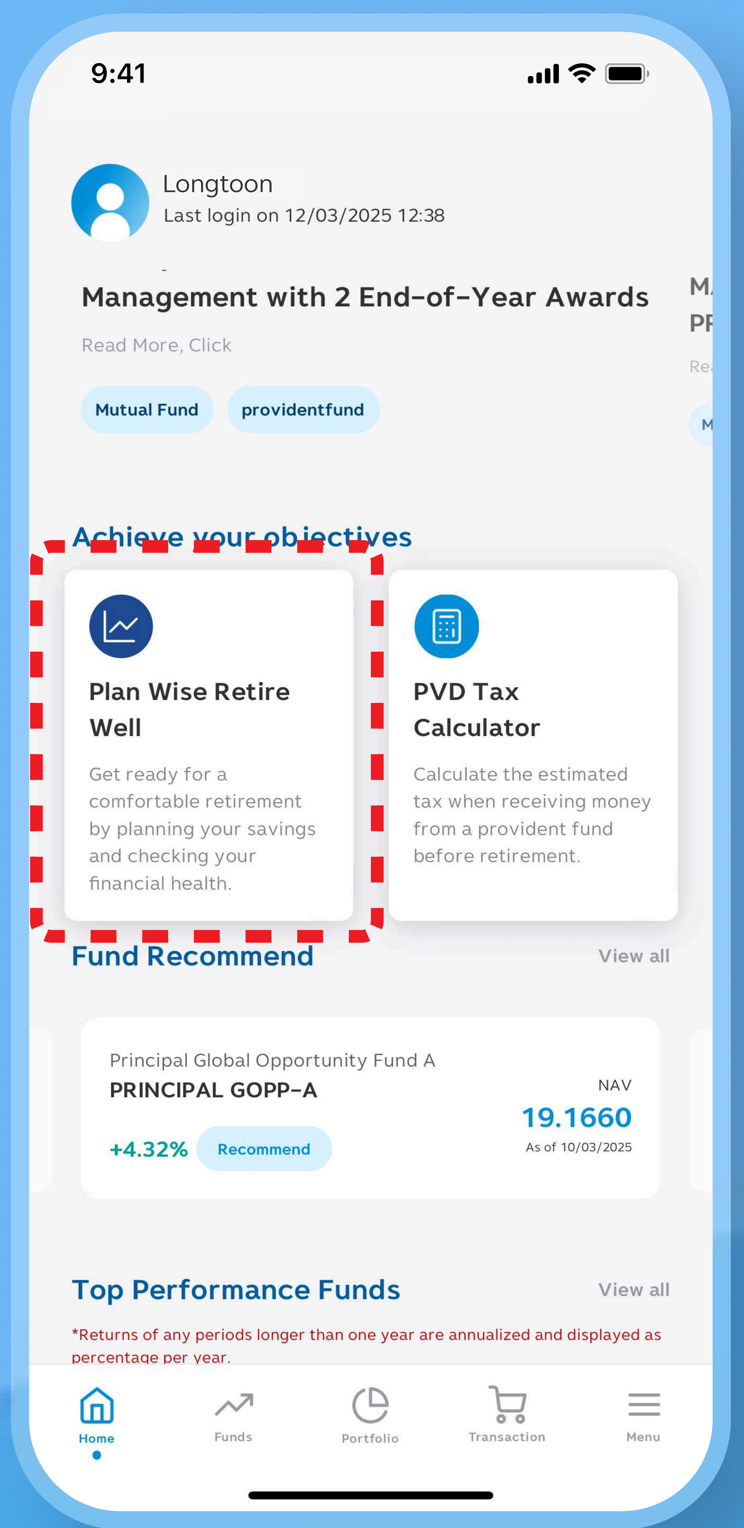


3. If Face ID or fingerprint login is set up, the system will log you in automatically.

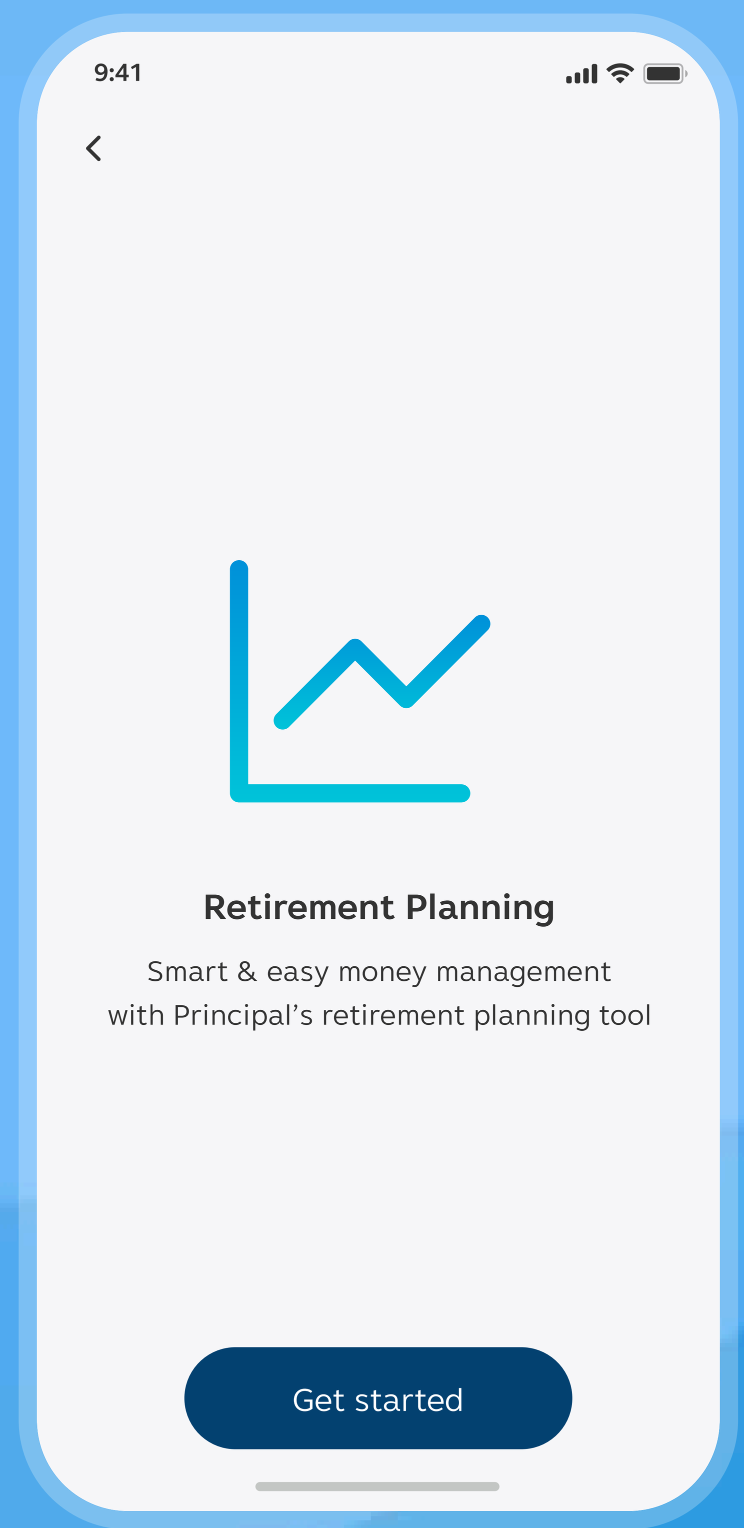


4. Go to "Home" page.

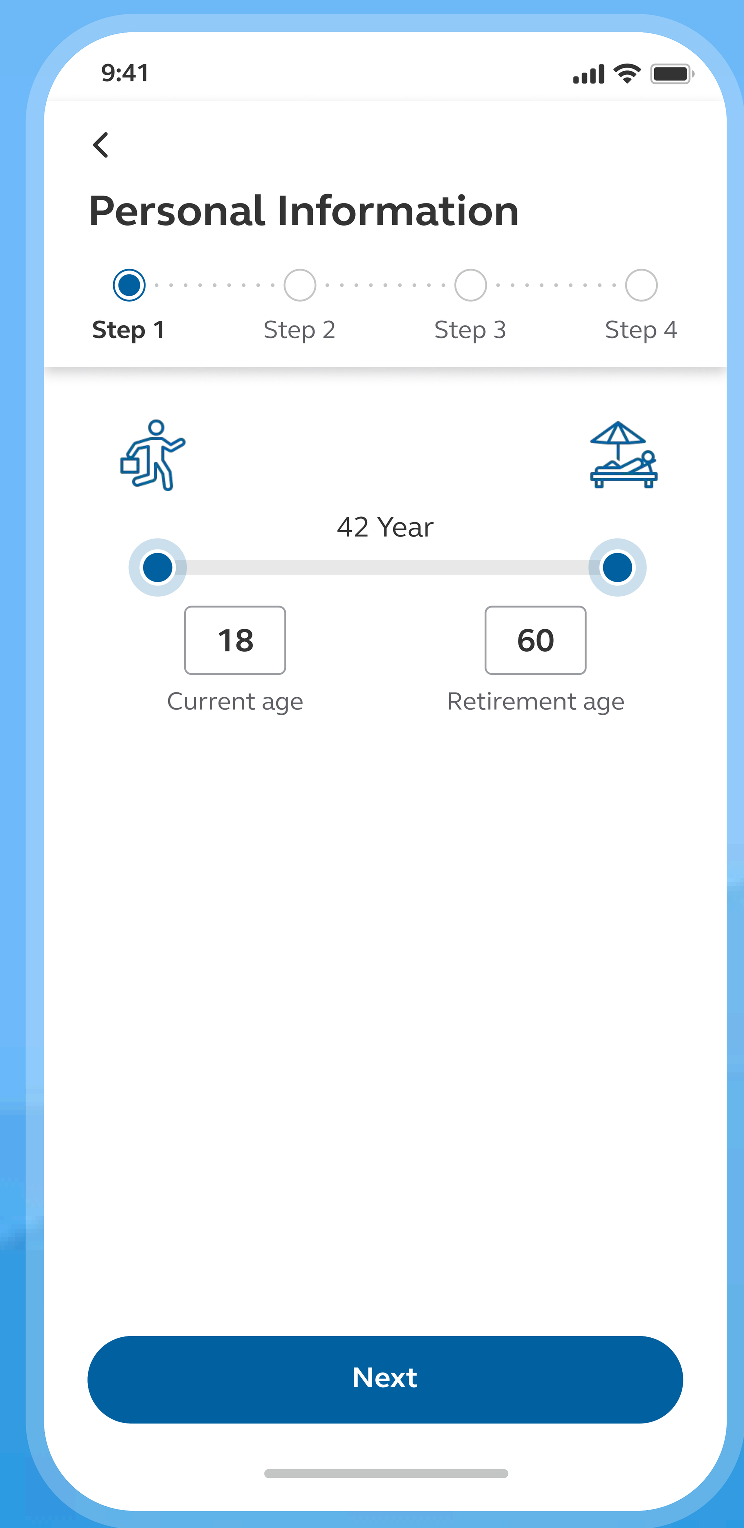
Plan Wise Retire Well:
Fill in Information



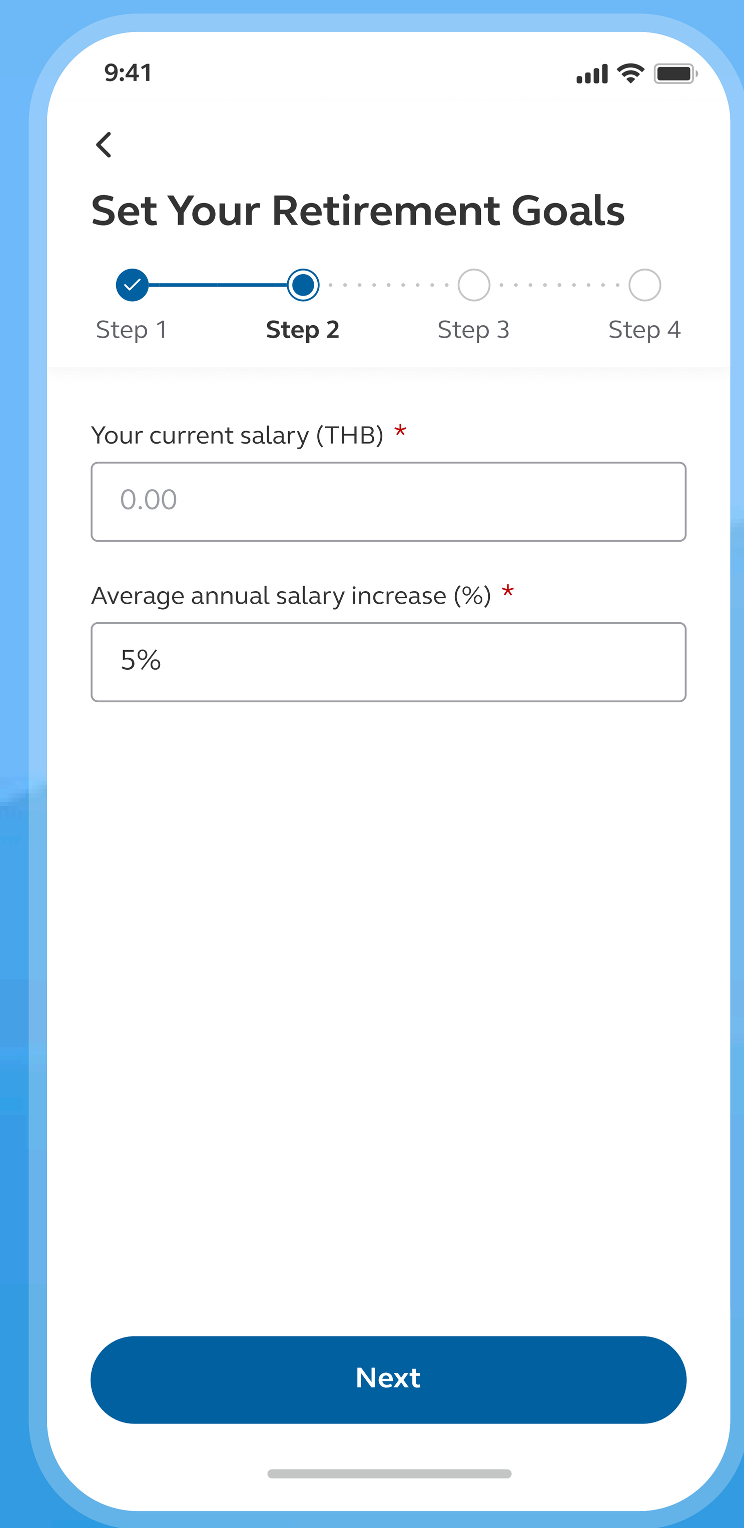
5. Click “Plan Wise Retire Well”.



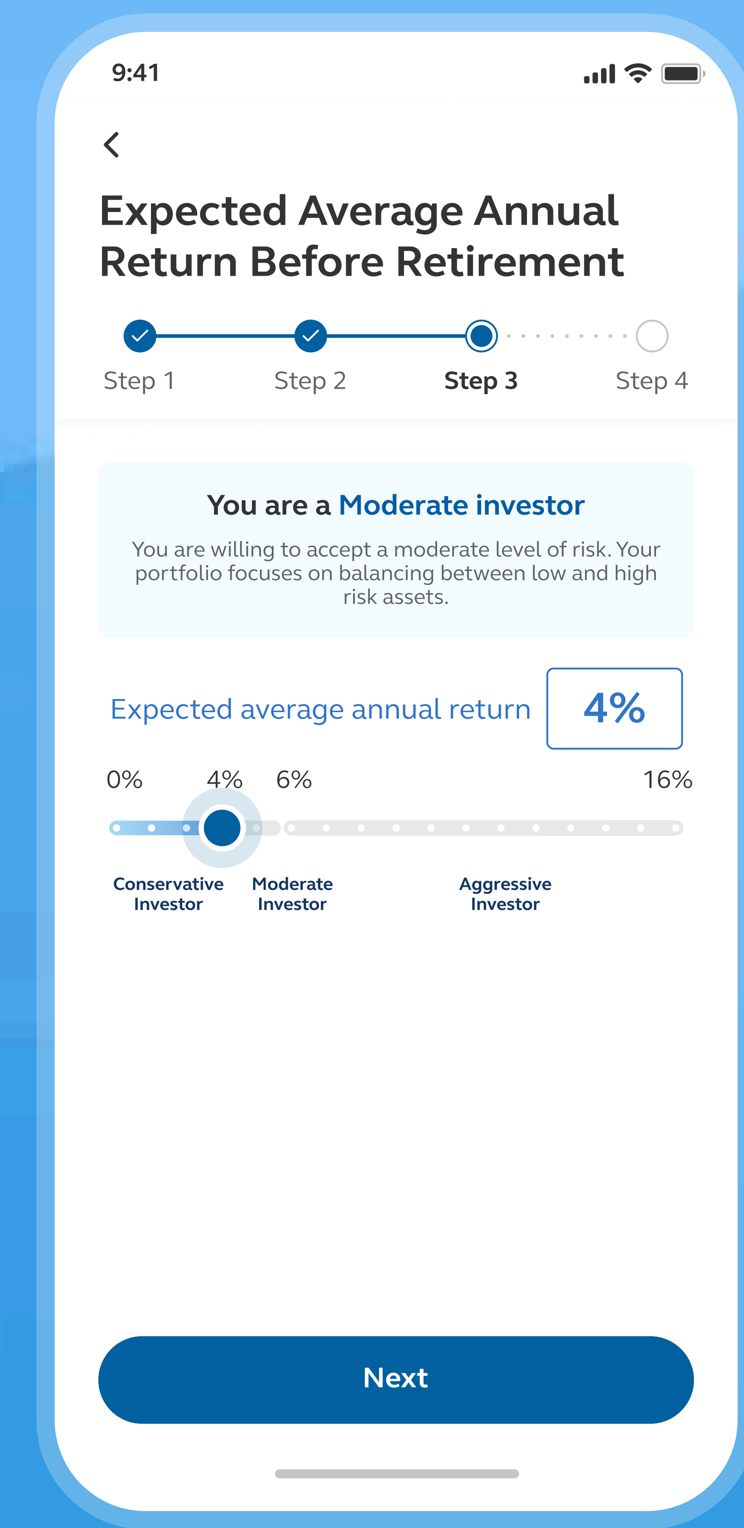
6. Click “Get started”.



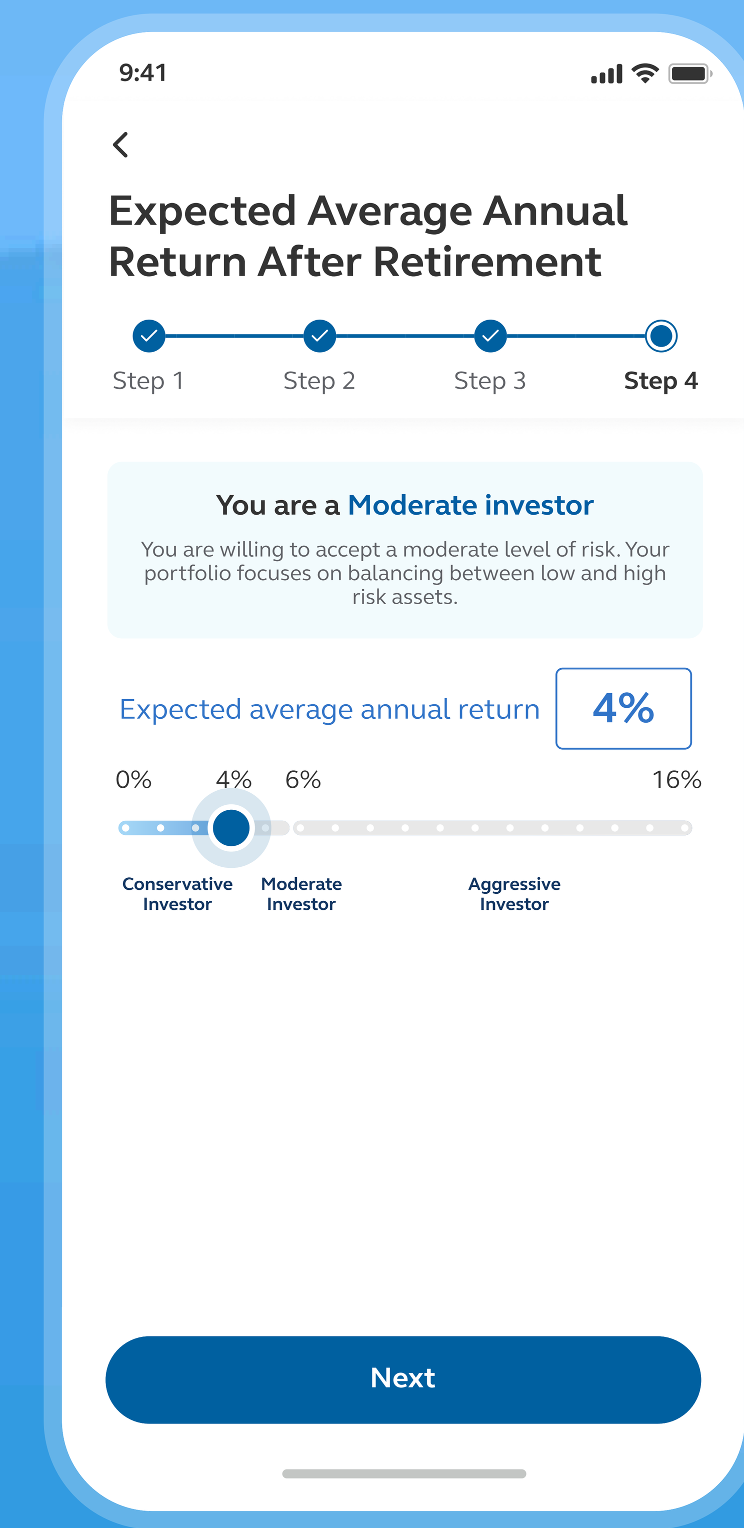
7. Fill in personal information.



8. Fill in retirement goals.



9. Fill in expected average annual return before retirement.



10. Fill in expected average annual return after retirement.

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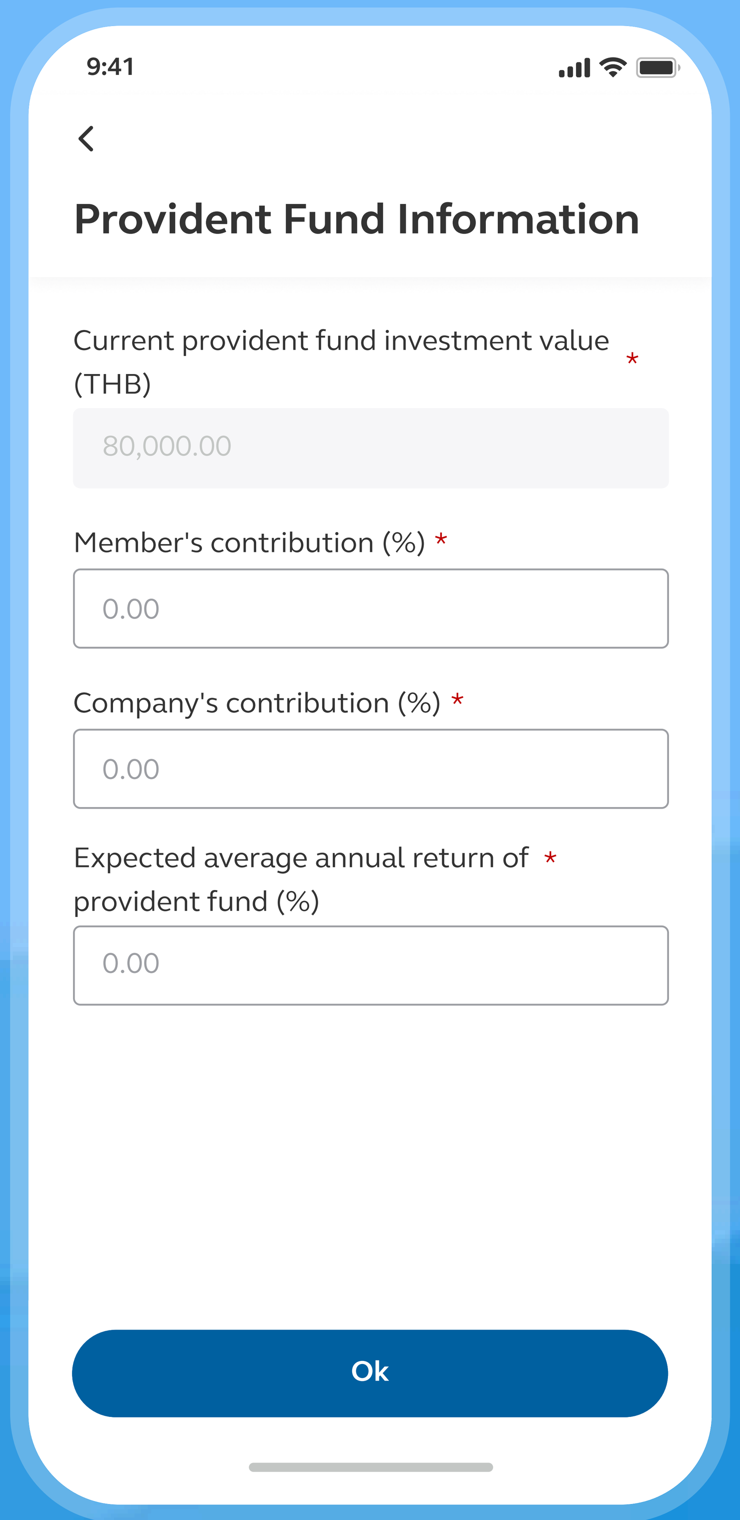
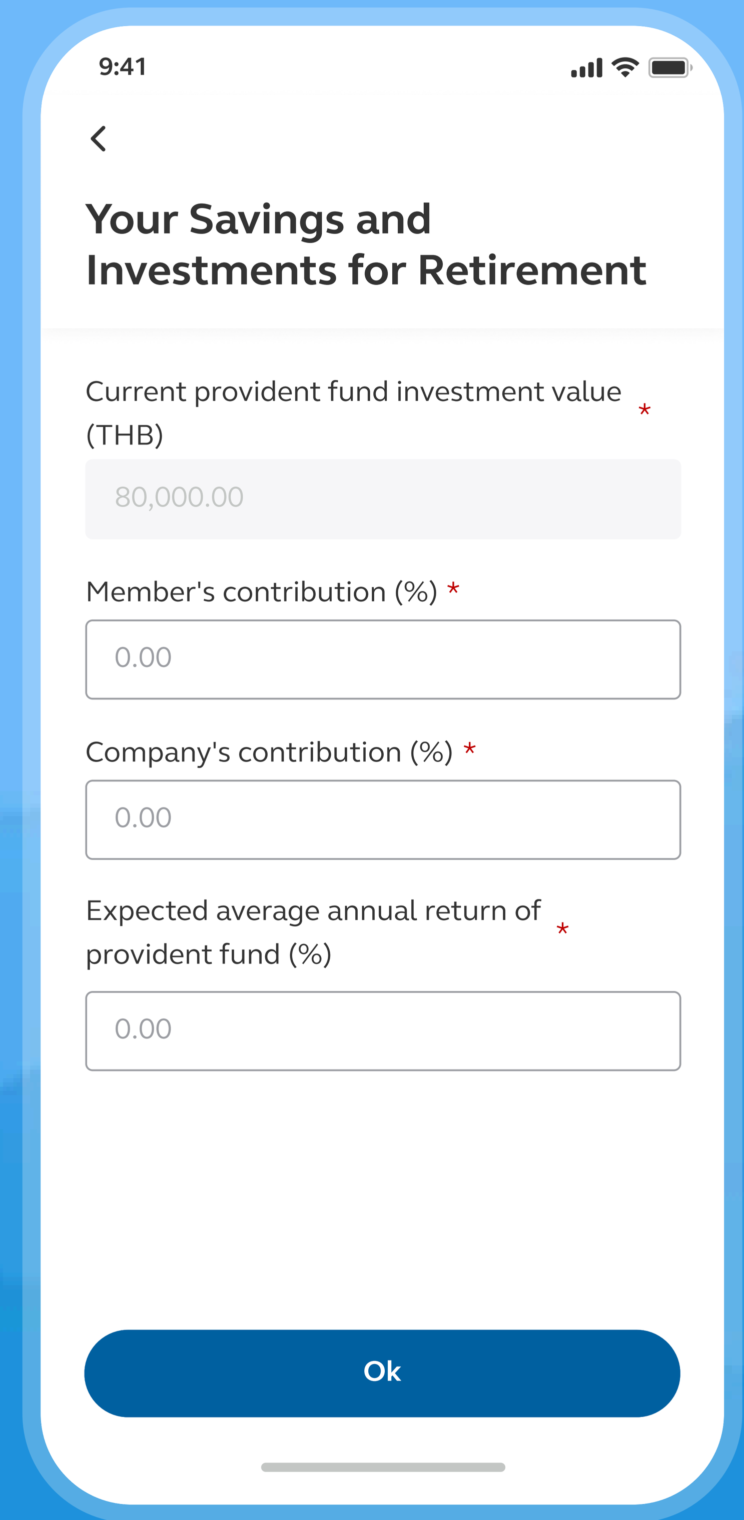
Plan Wise Retire Well:
Fill in Information



11. Fill in provident fund information.

1



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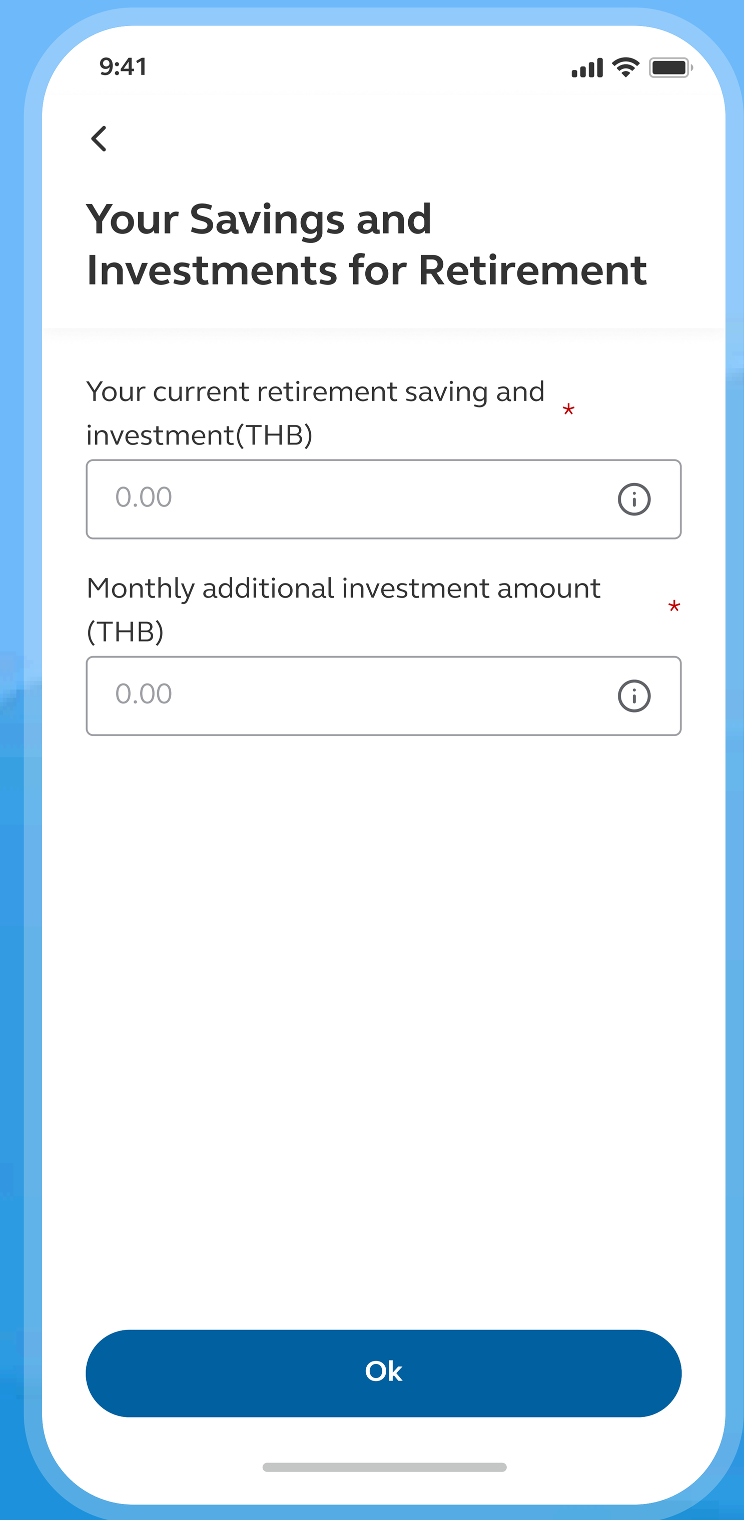
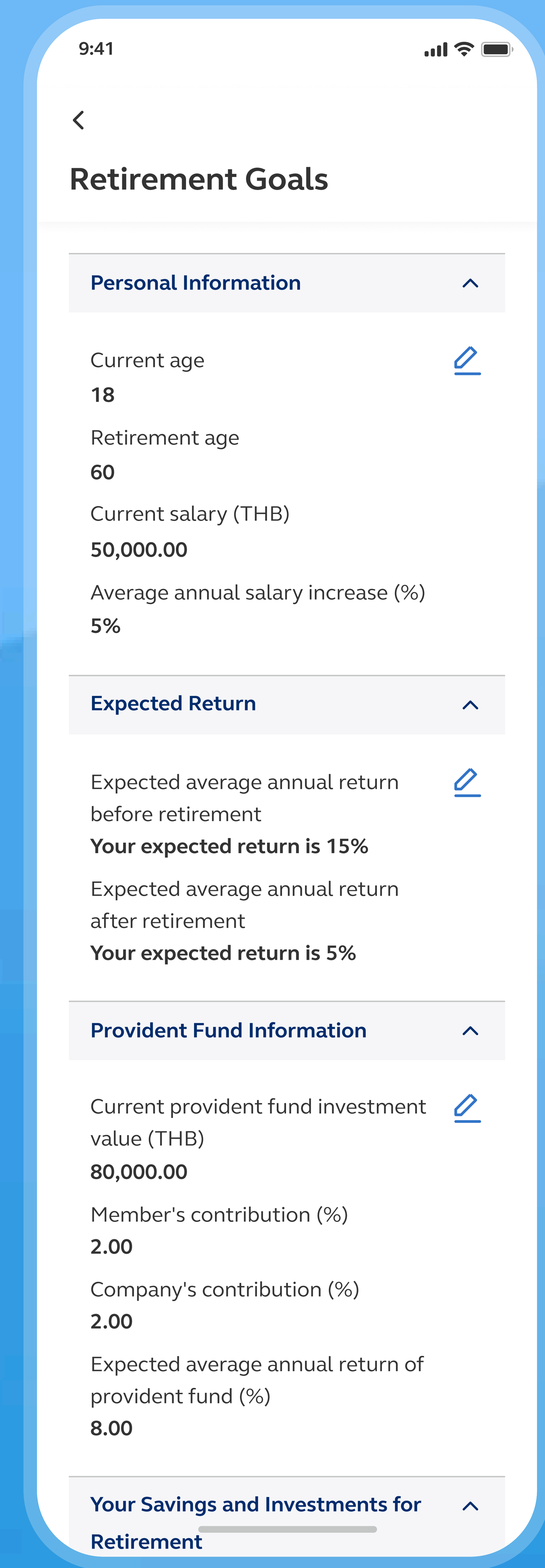
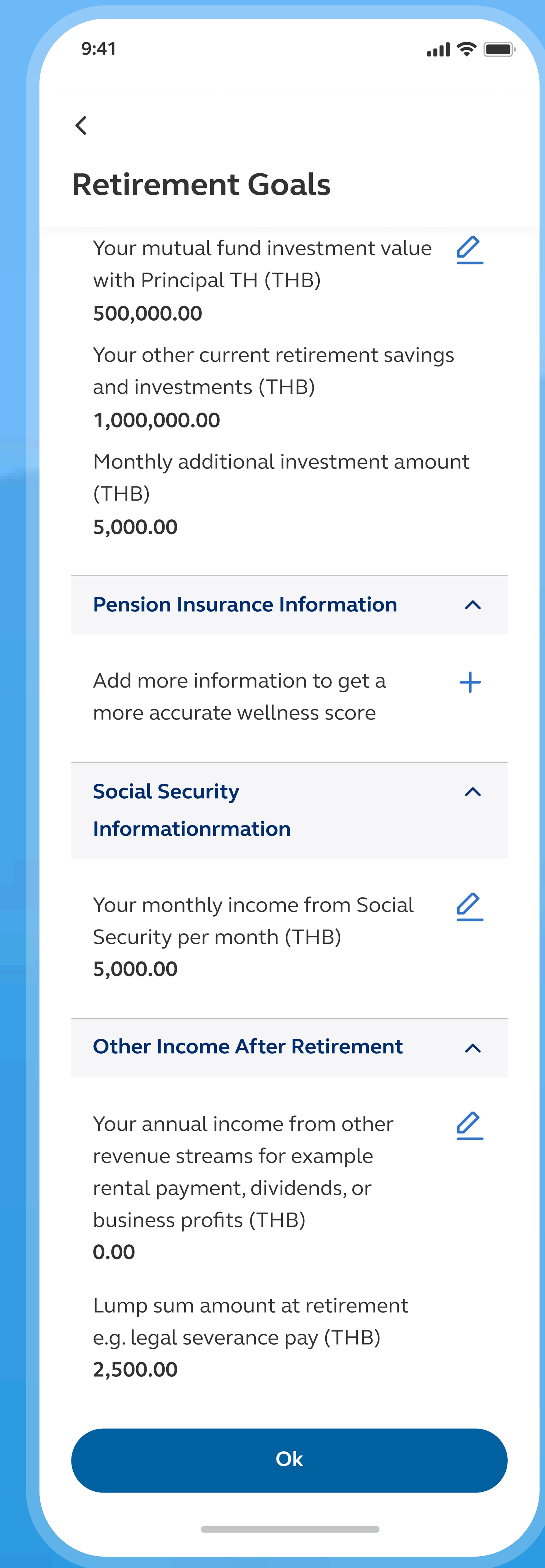


12. Fill in savings and investments for retirement.
1: Display for mutual fund unitholder
2: Display for users without mutual fund unitholder

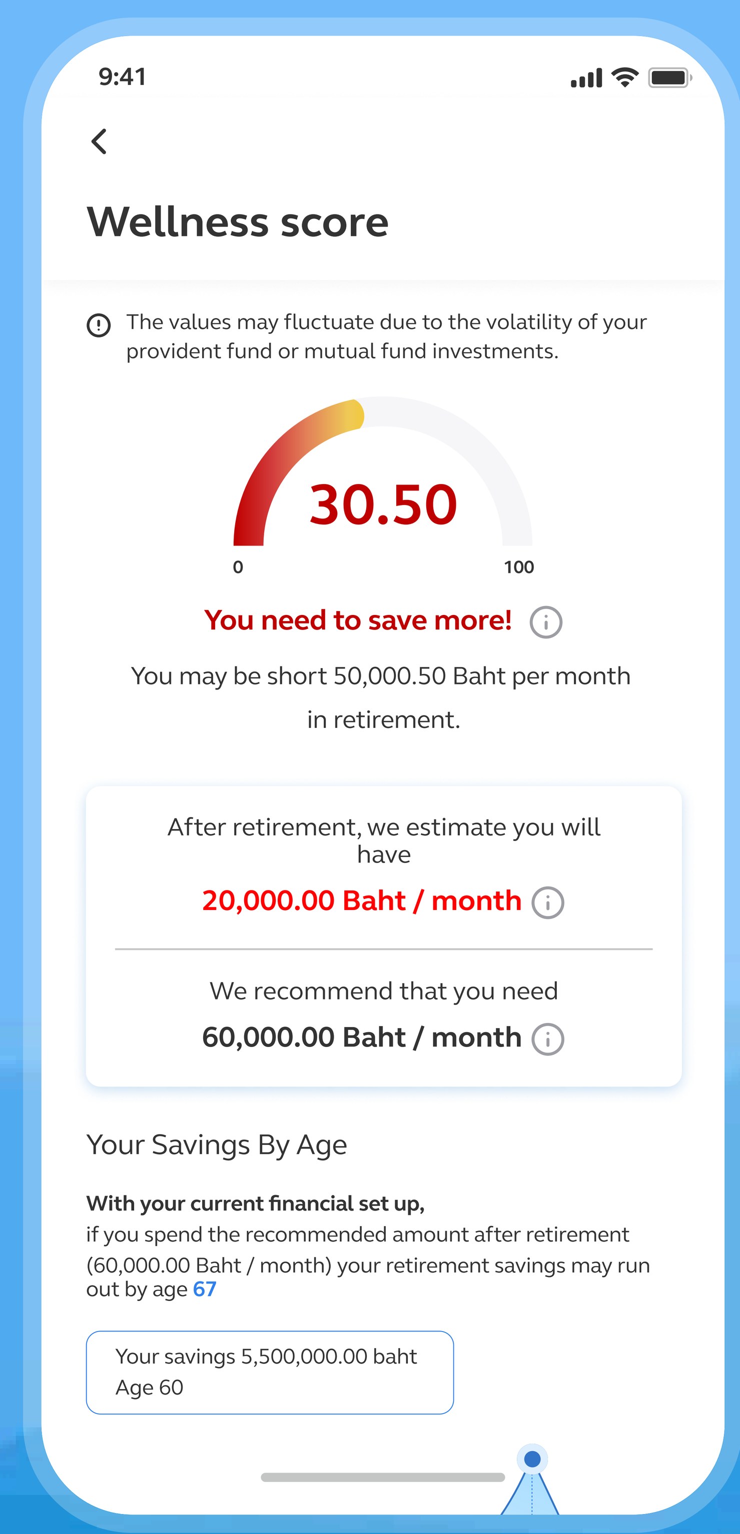




13. Review the information and click "Ok".

Plan Wise Retire Well:
Wellness Score

①



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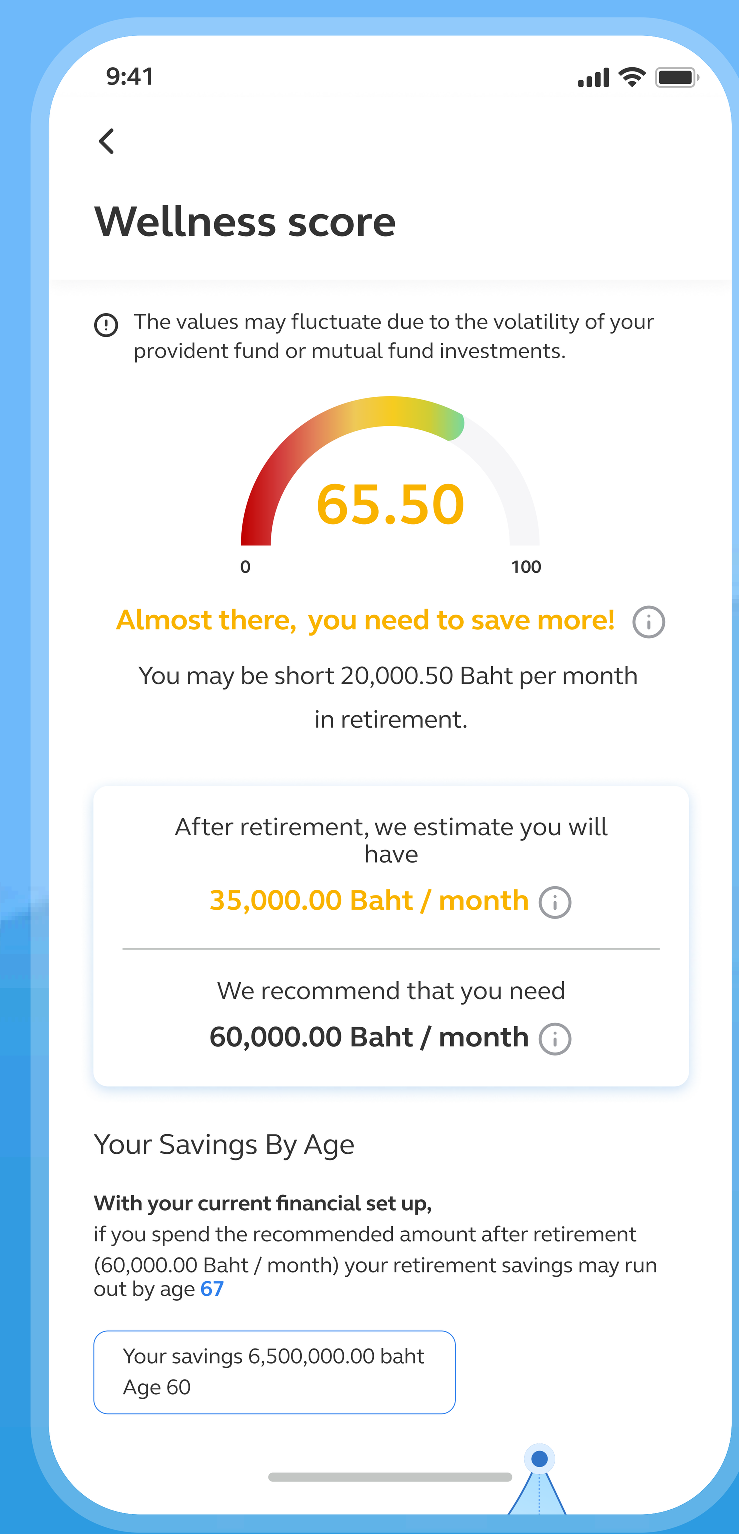

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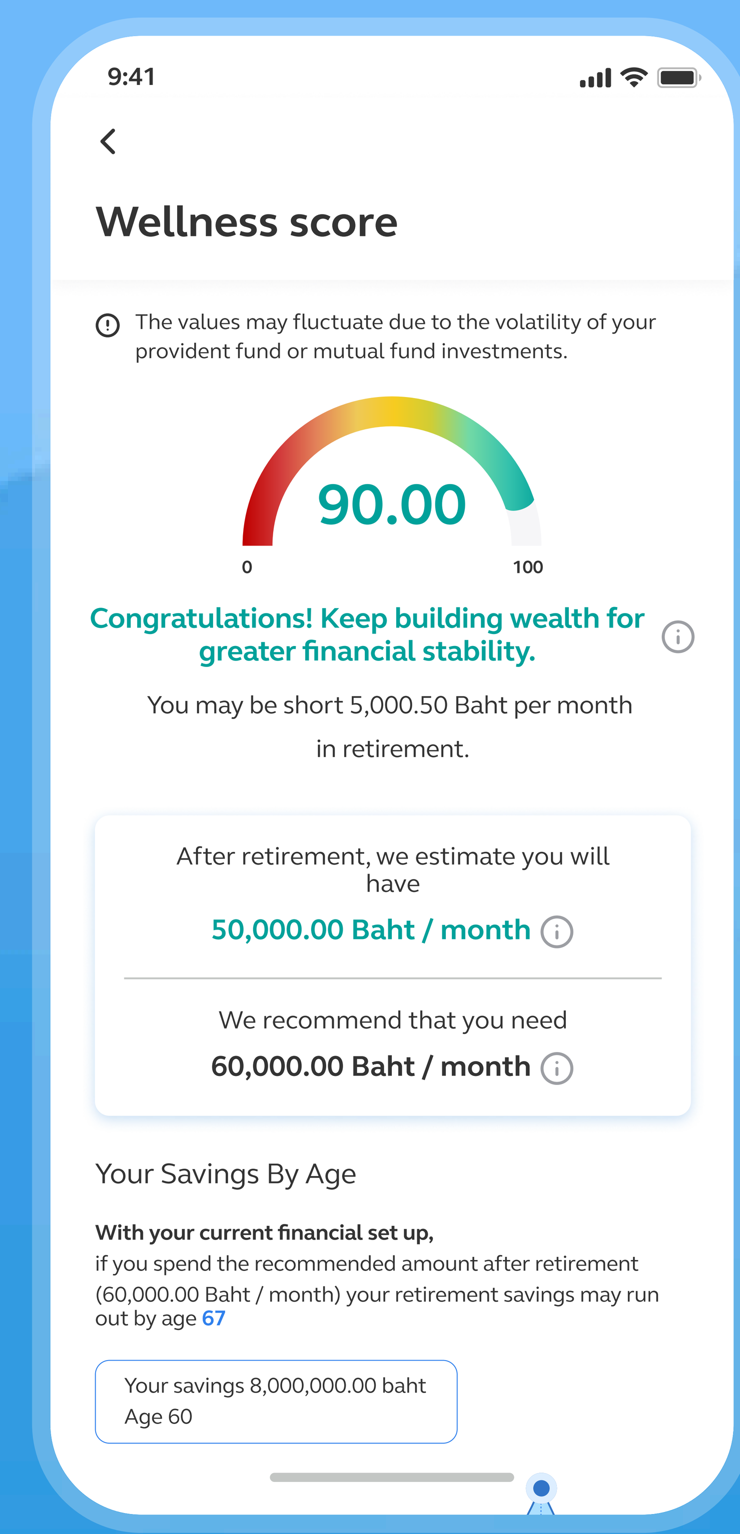


14. Wellness score:

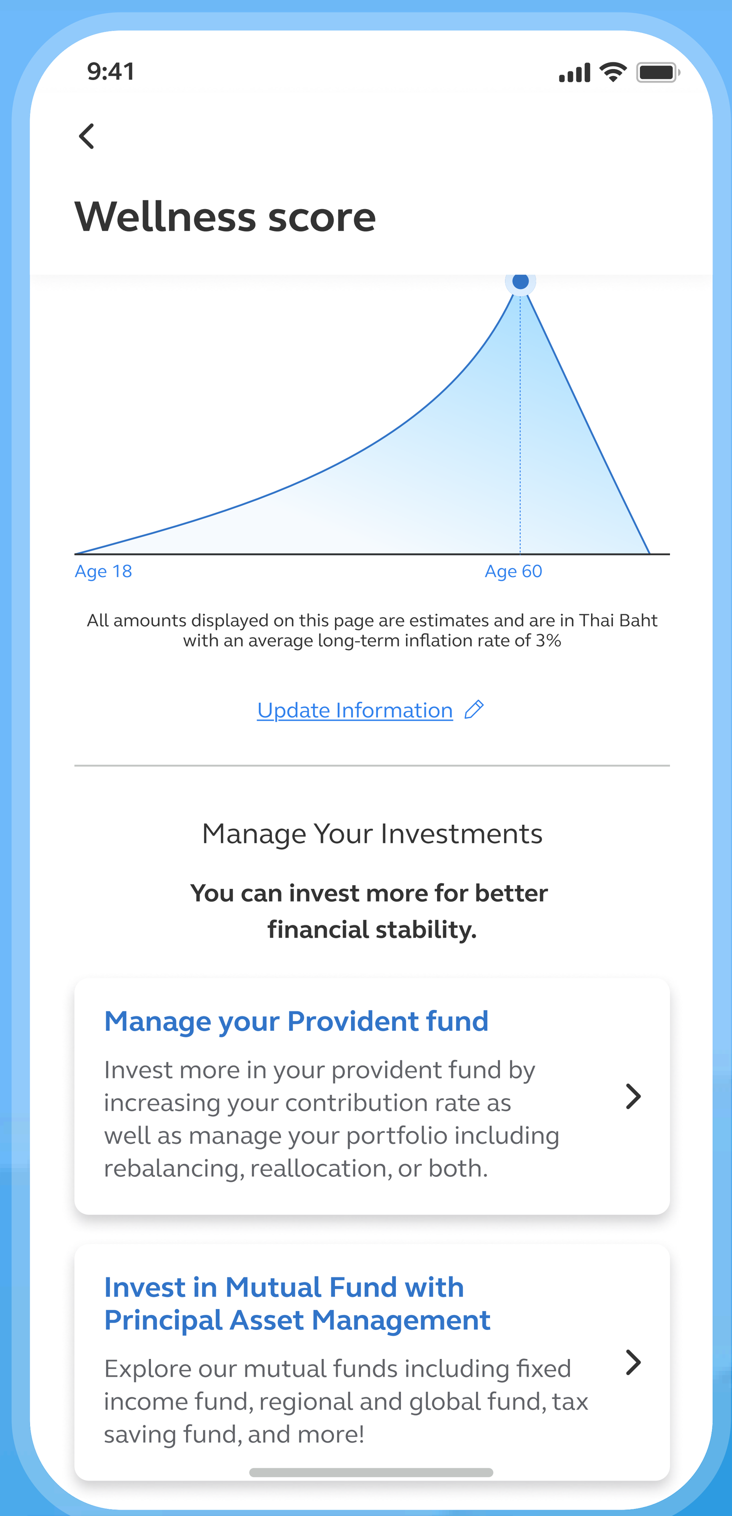
1: Low score according to the criteria

2: Medium score according to the criteria

3: High score according to the criteria

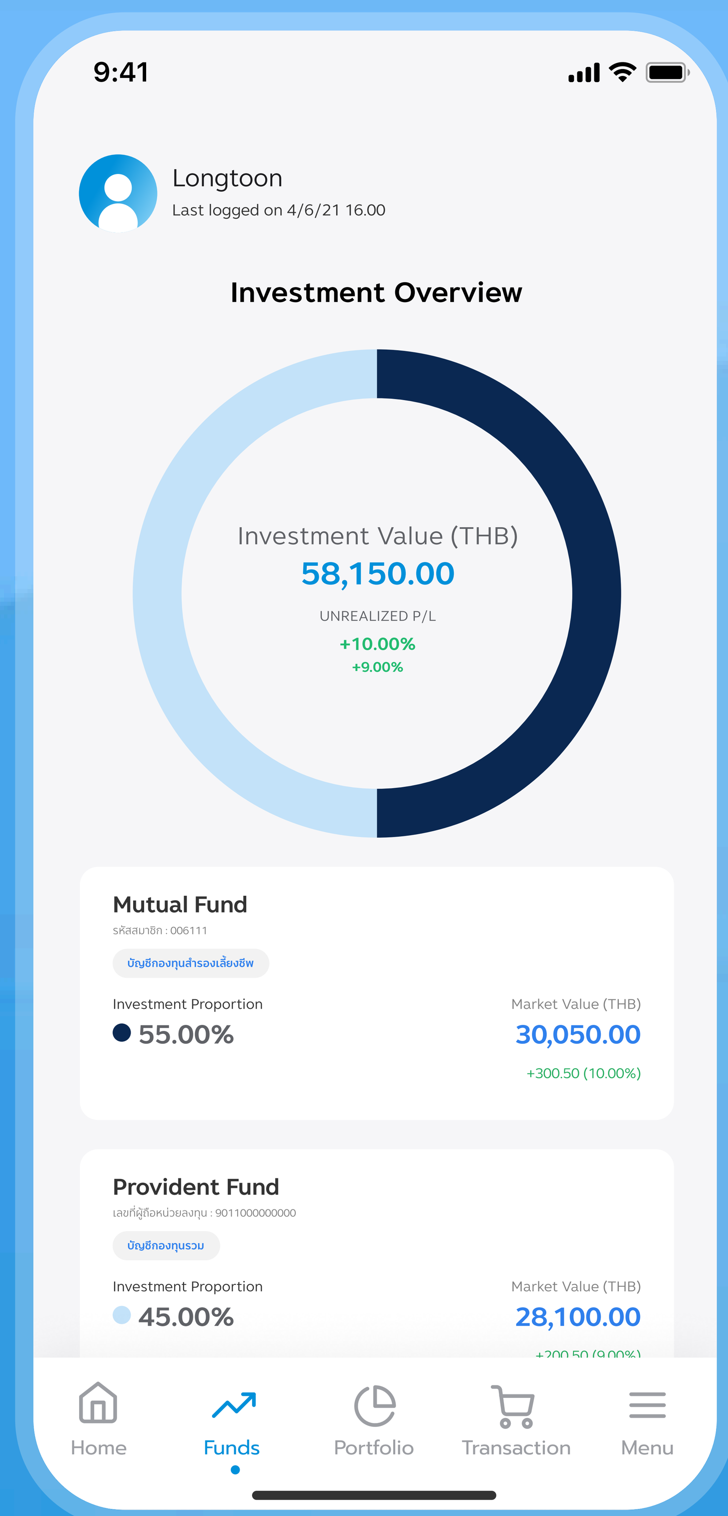
Plan Wise Retire Well:
Wellness Score

1



2

1



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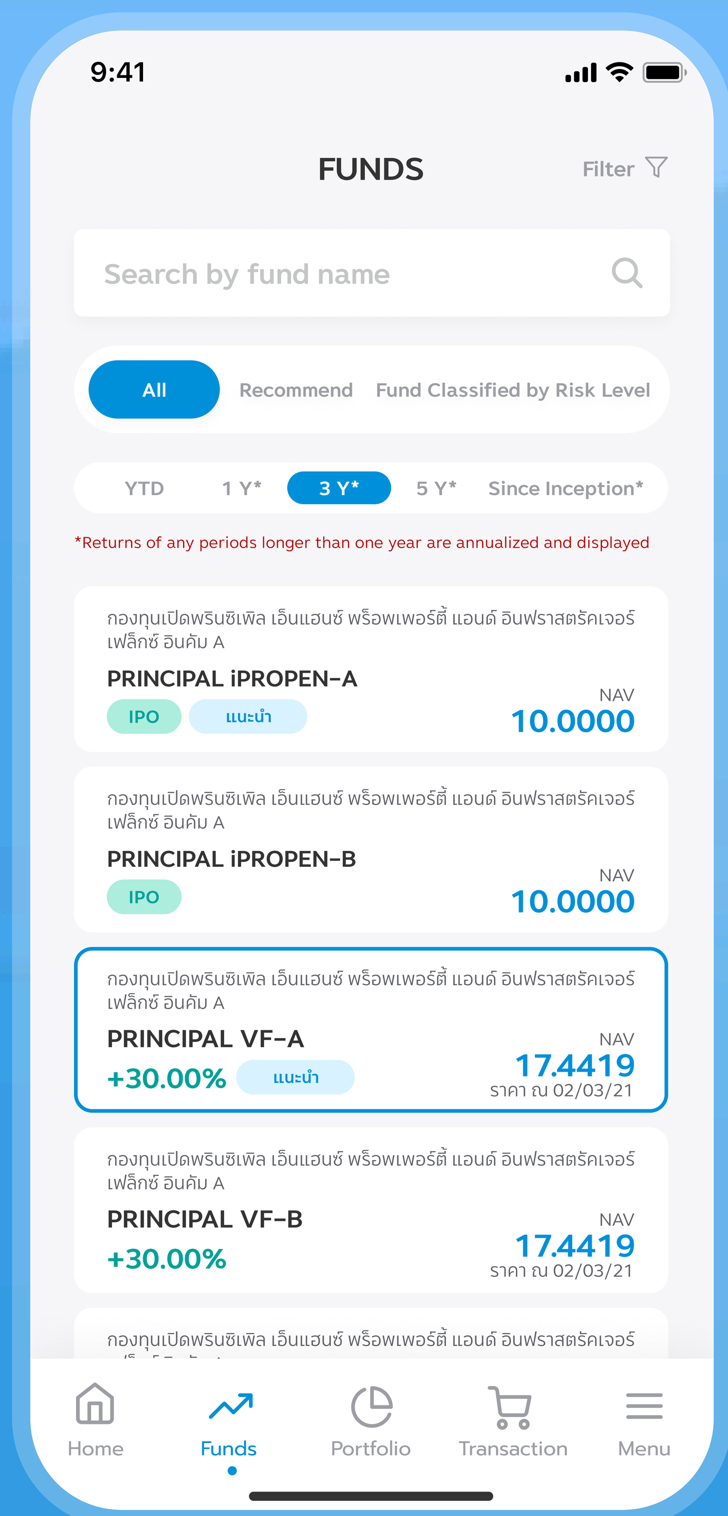


Wellness score: Your Savings by Age

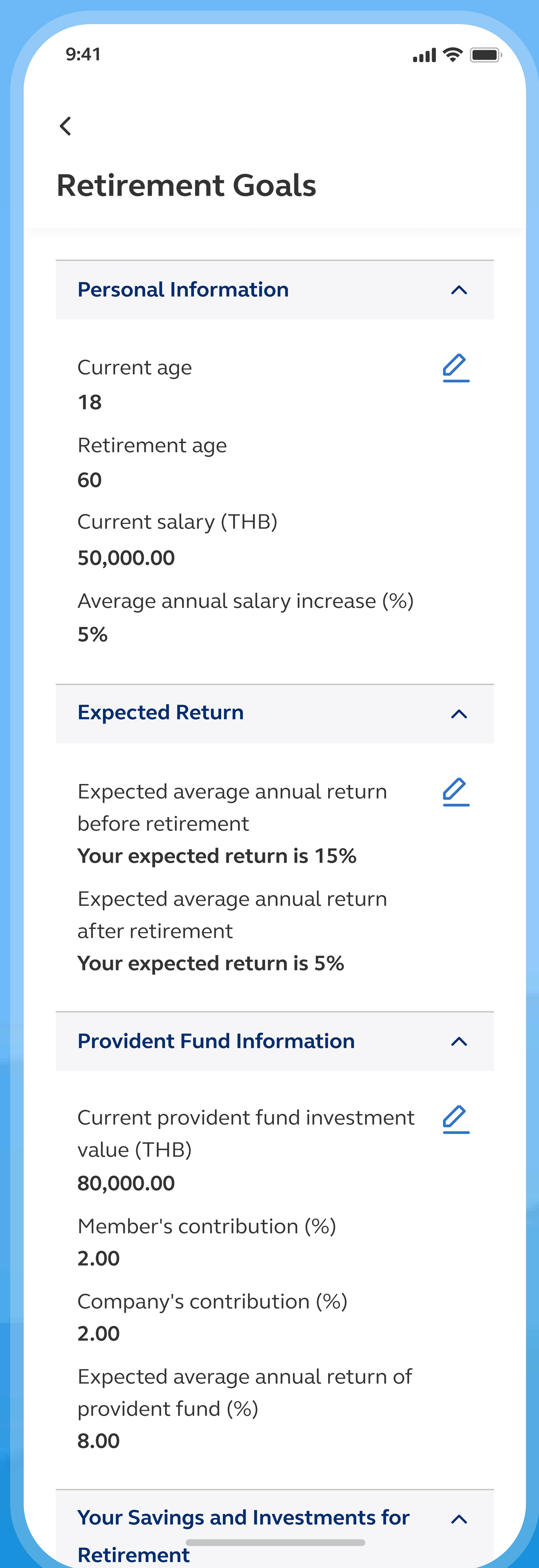
1: Display for Provident Fund unitholders
2: Display for users without Provident Fund unitholder

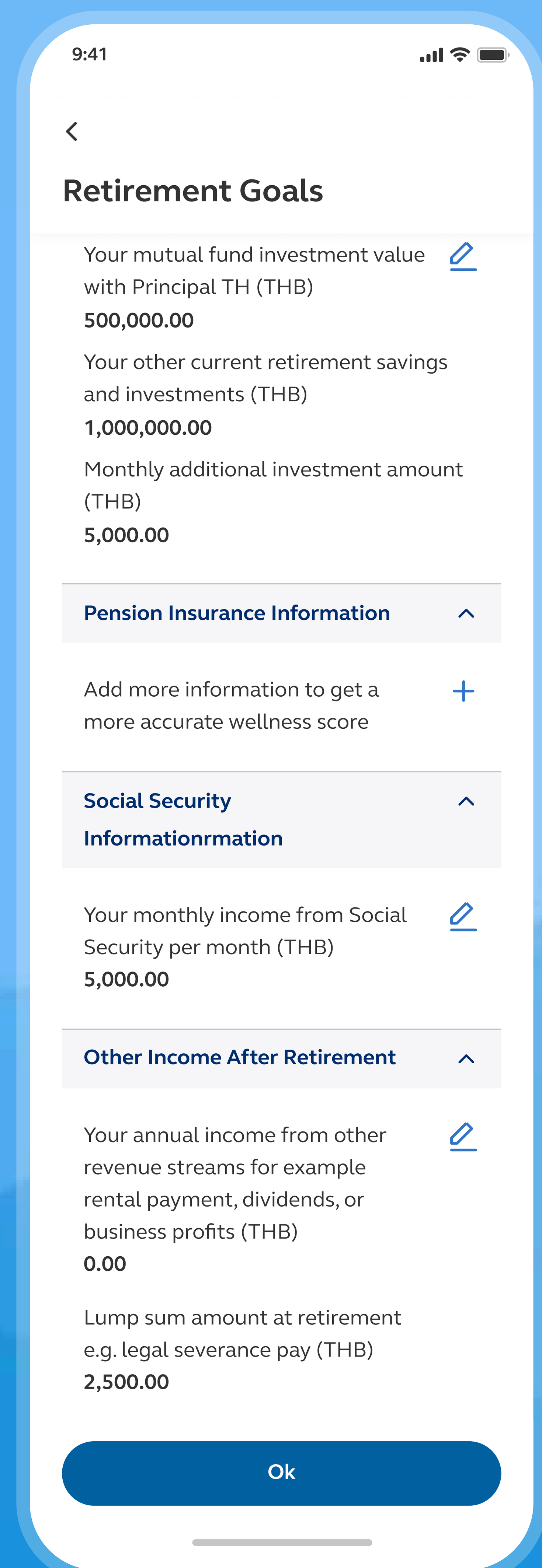
Click on banner:

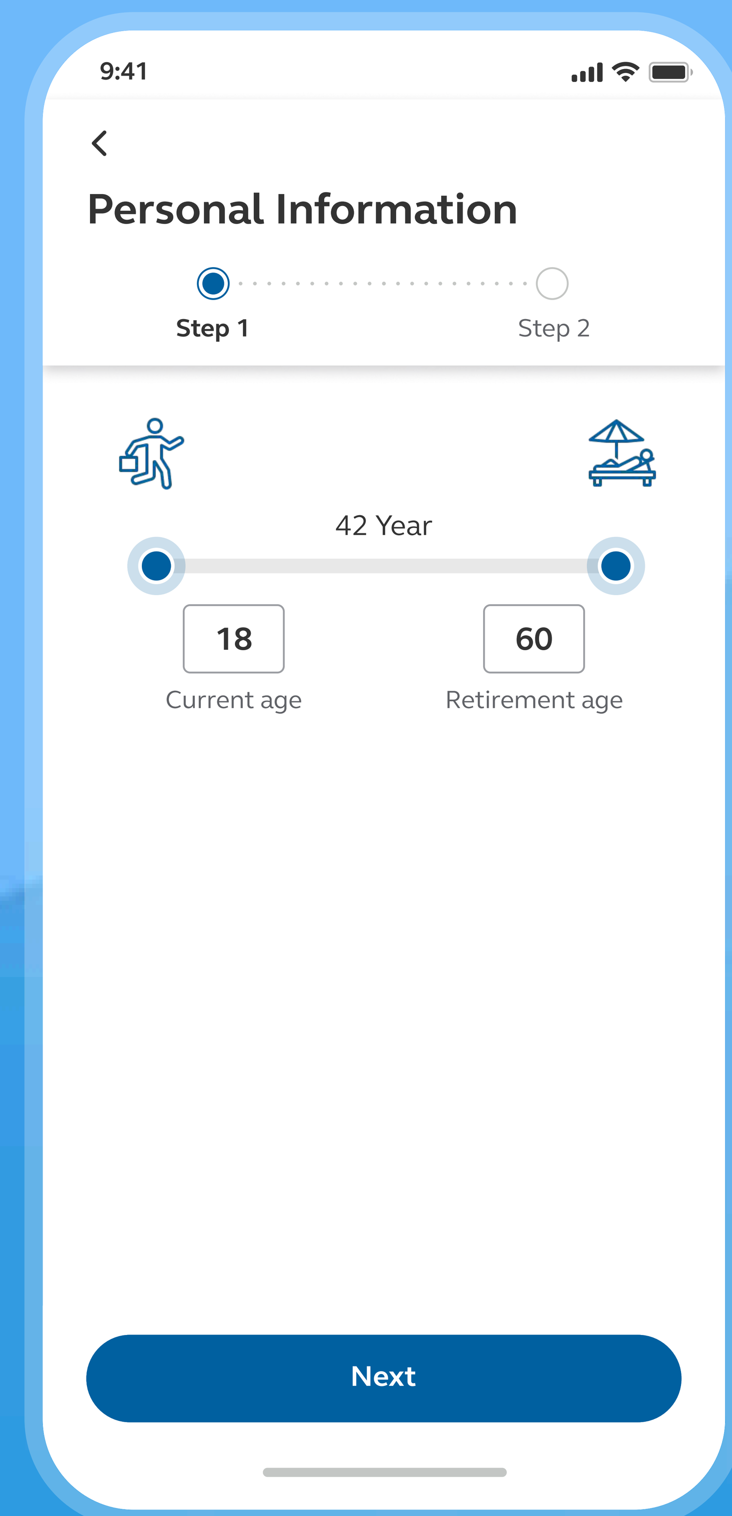
1: Click Manage Your Provident Fund, go to Portfolio Page.
2: Click Invest in Mutual Fund with Principal Asset Management, go to Fund Tab.

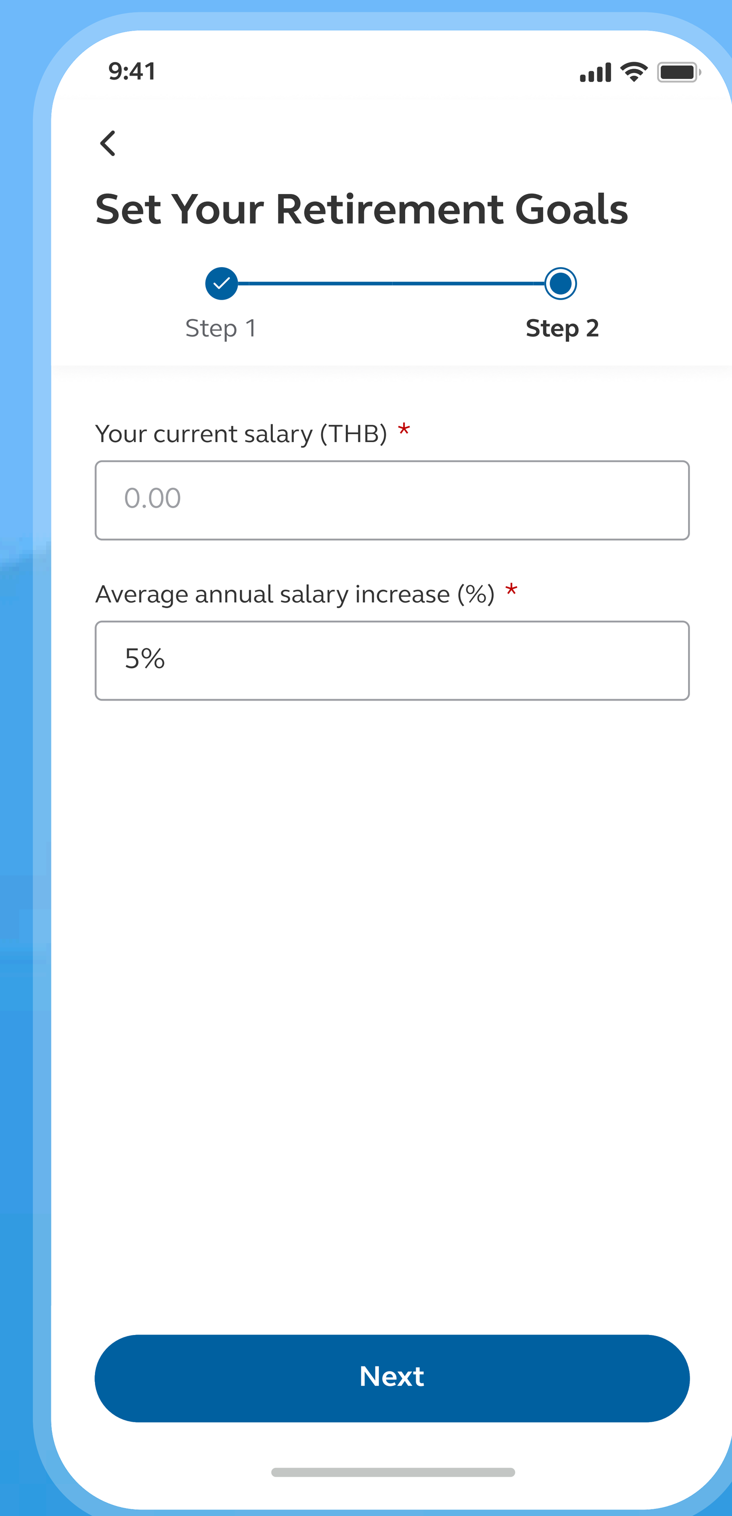
Plan Wise Retire Well: Edit Information

From the wellness score page, you can add/edit any information that you want to change.

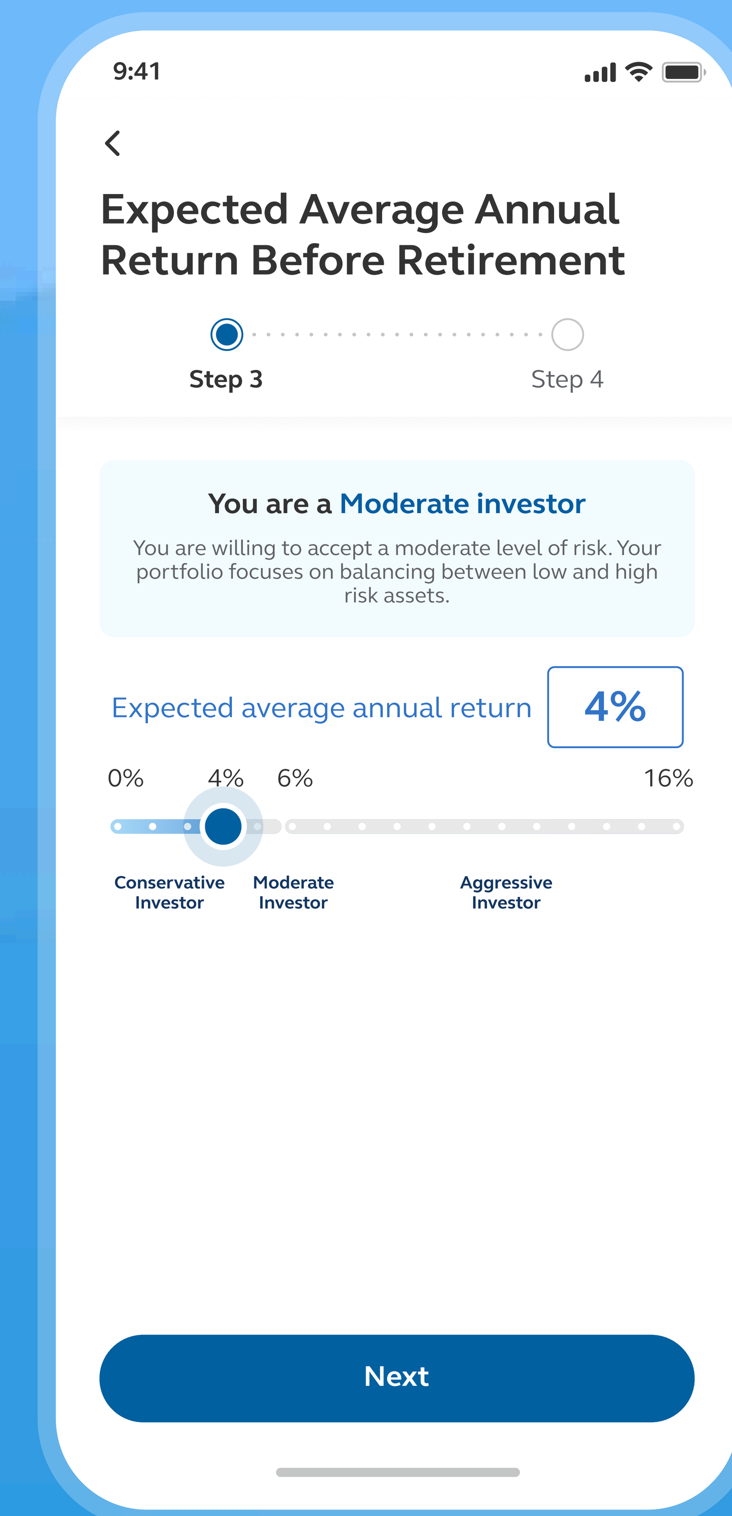


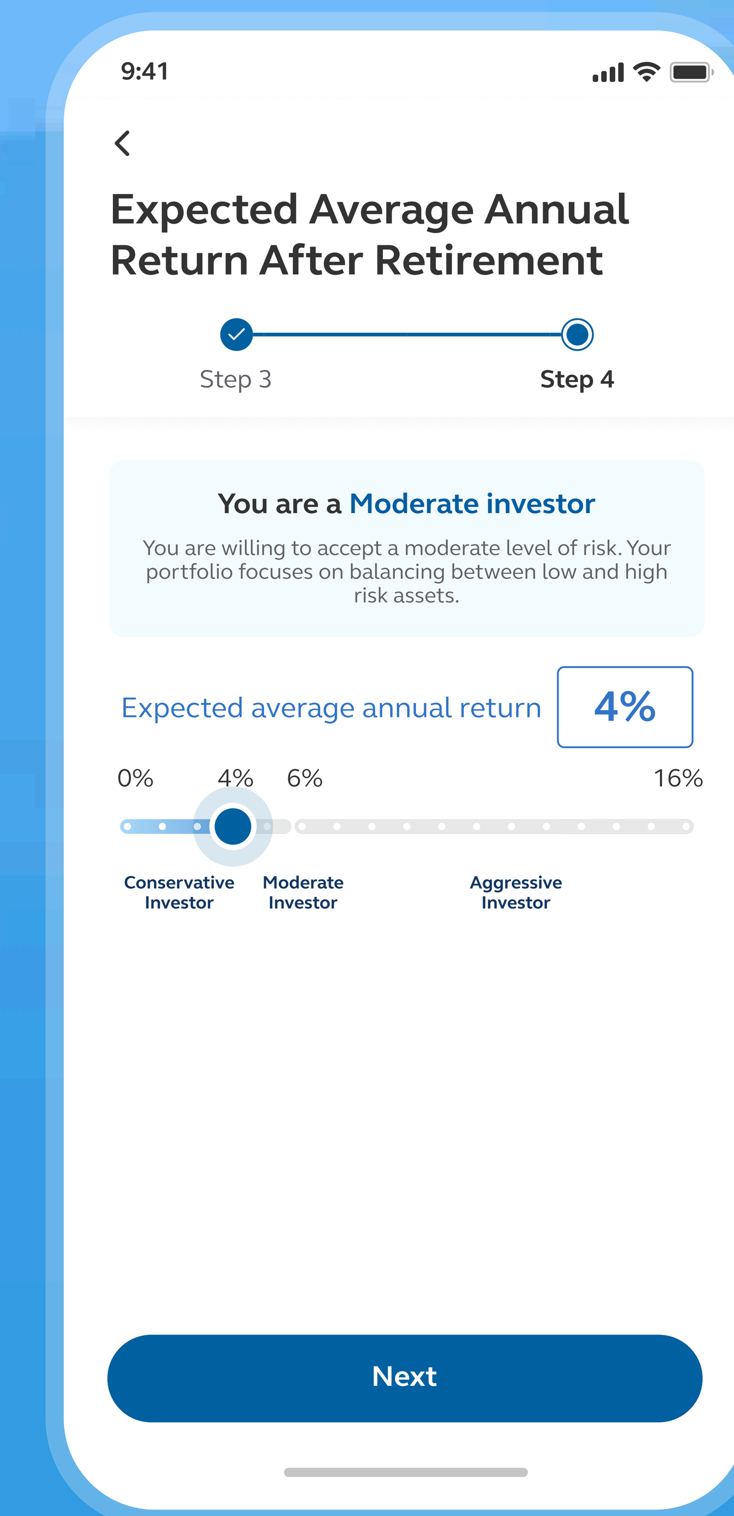






Edit personal information





Edit expected average annual return before and after retirement

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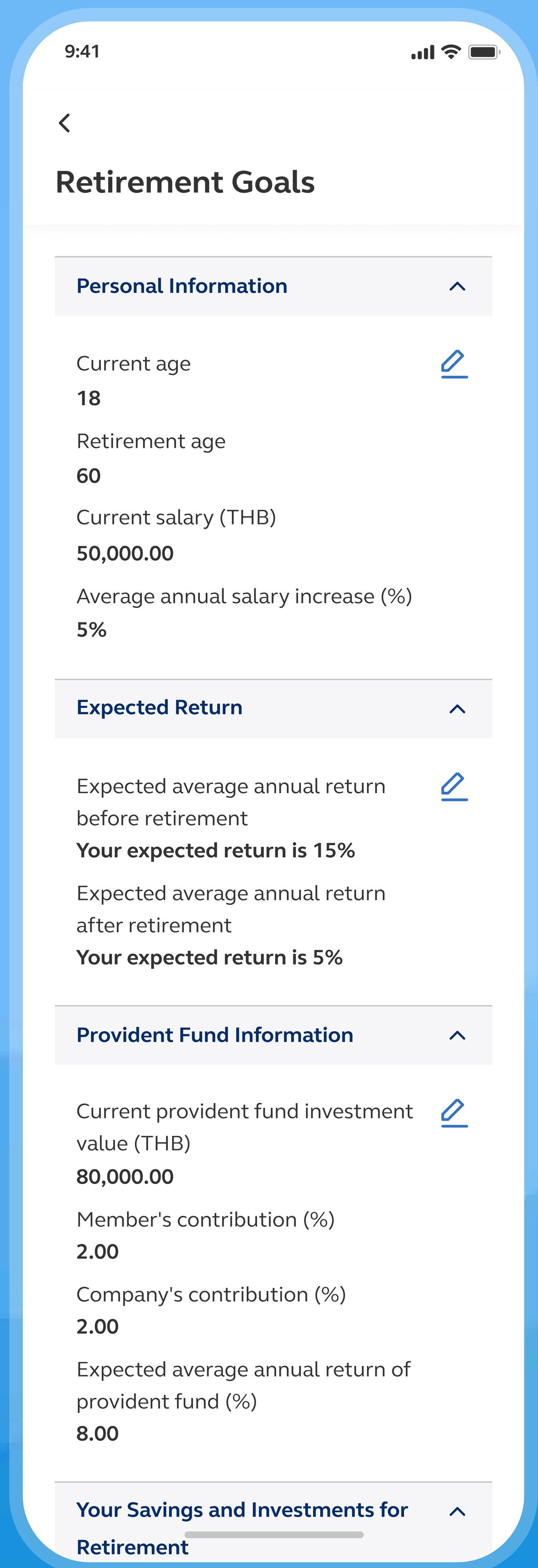
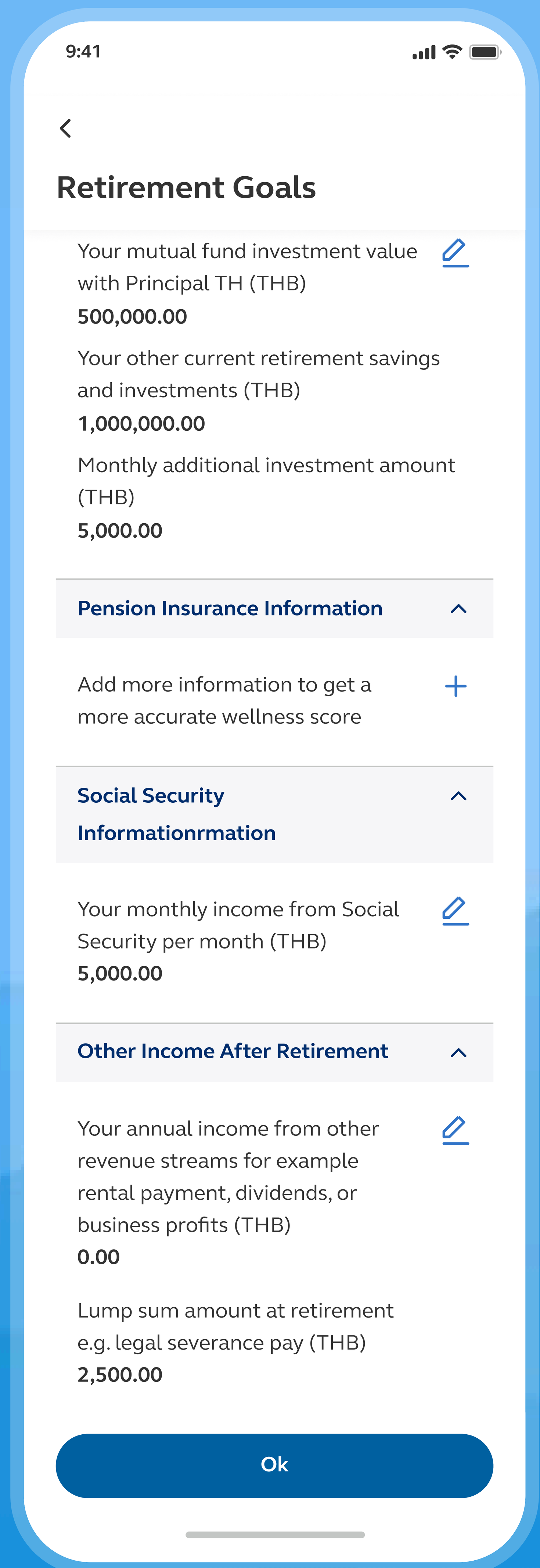
Plan Wise Retire Well:
Edit Information

From the wellness score page, you can add/edit any information that you want to change.





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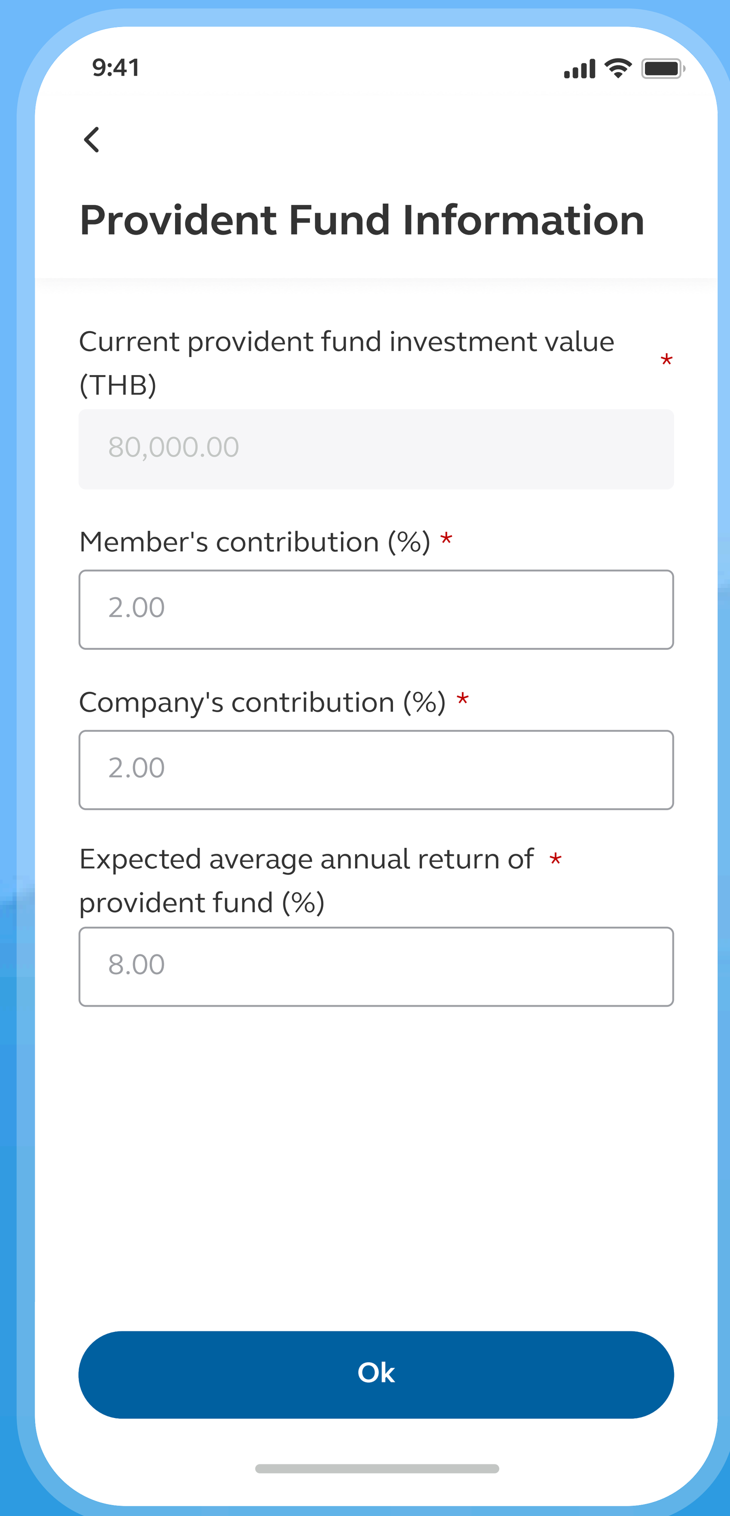

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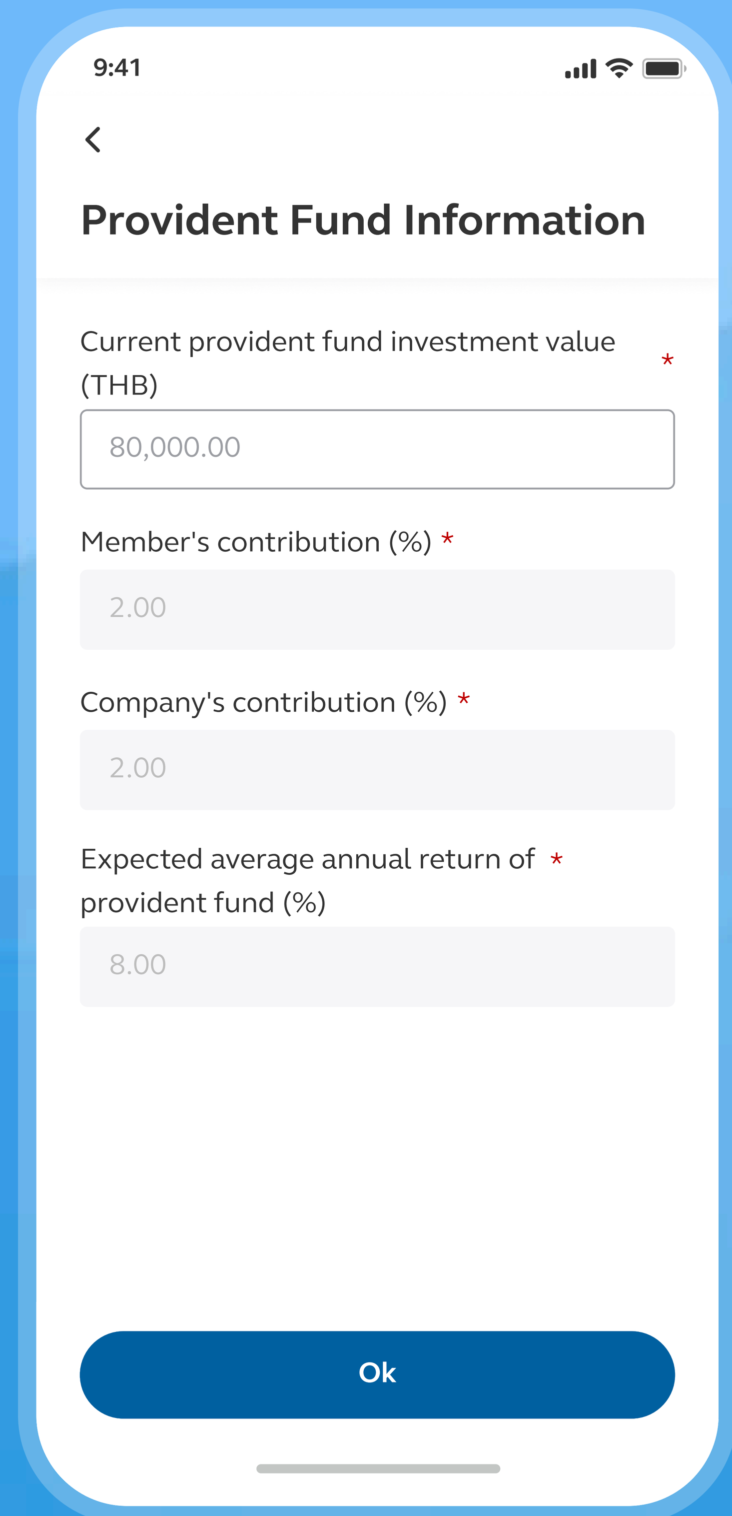

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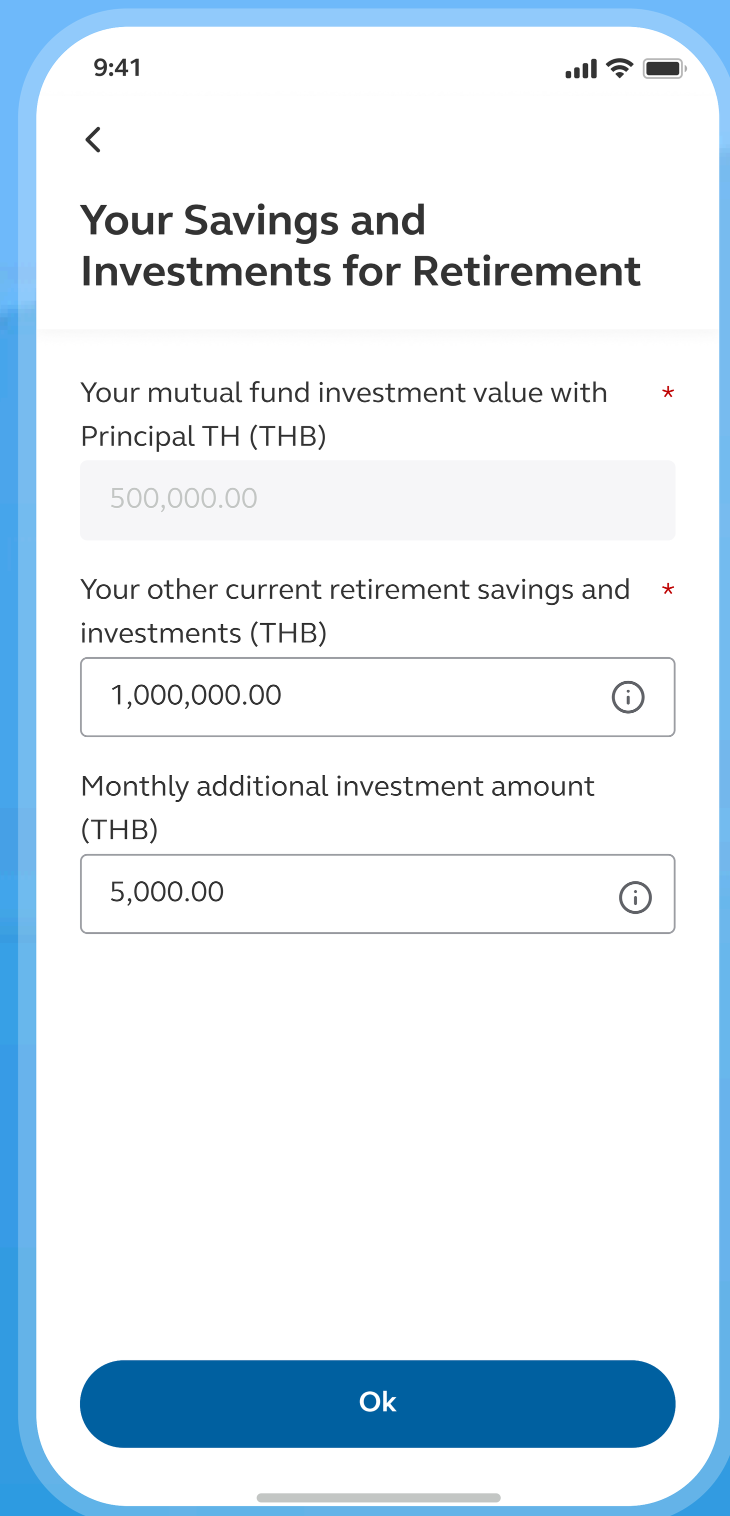

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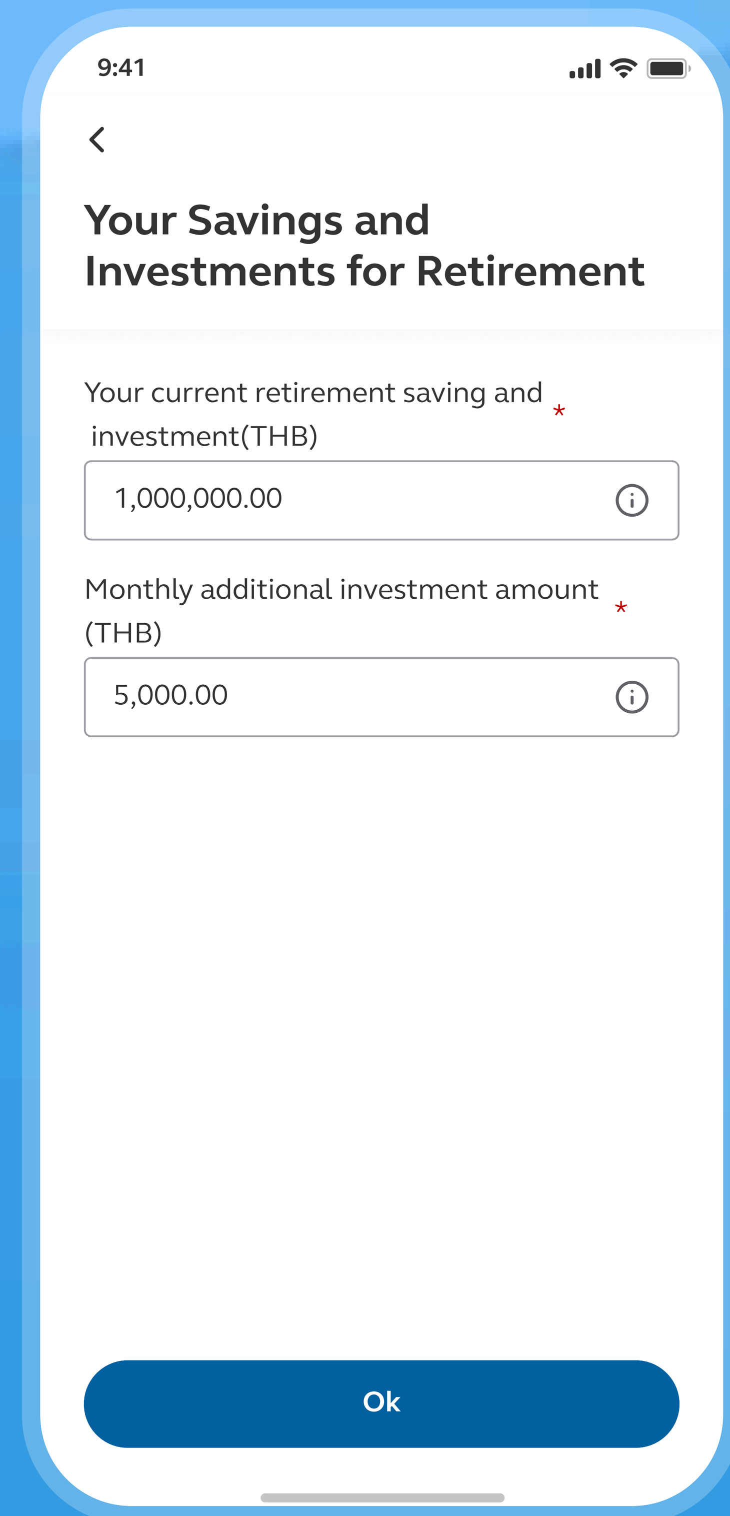


Edit provident information

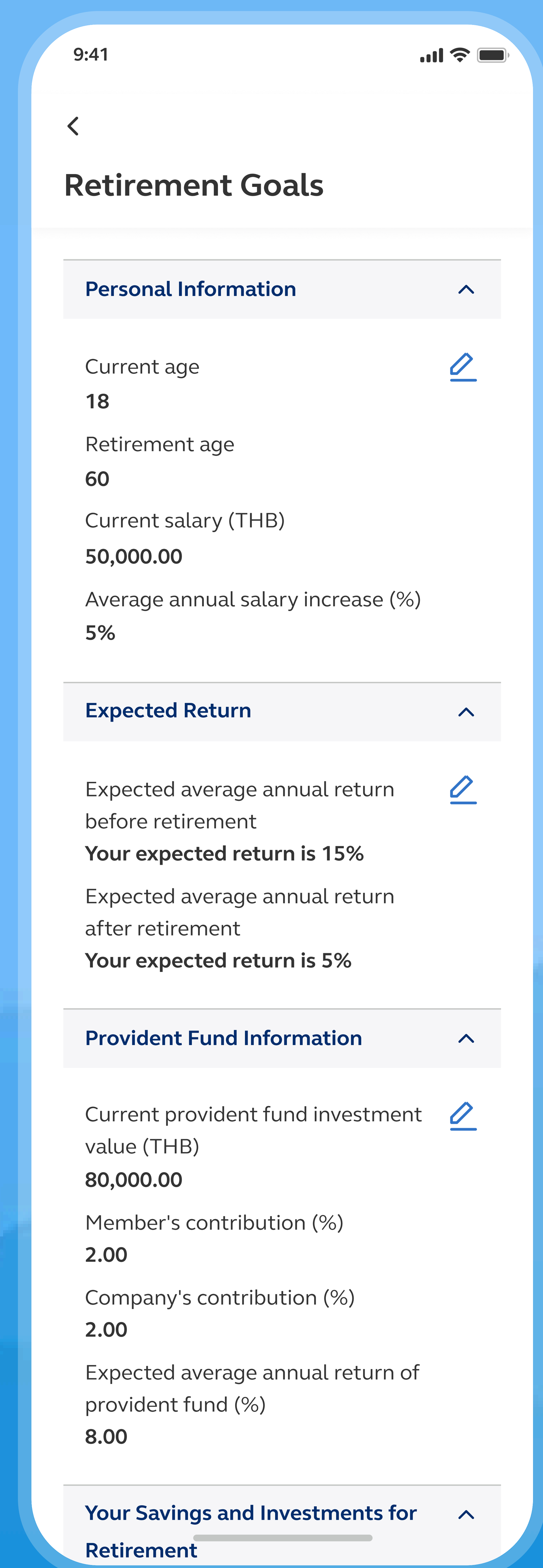
1: Provident fund Unitholders cannot edit the investment value
2: Users without provident fund Unitholders can edit the investment value

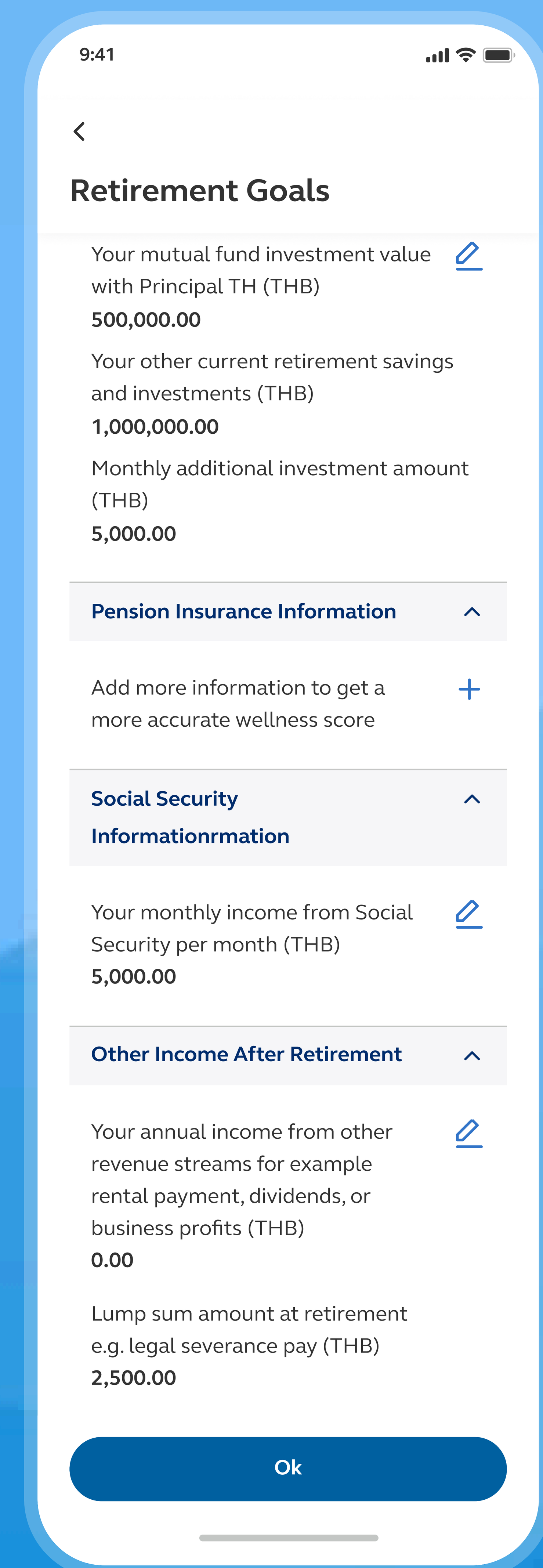
Edit your savings and investments for retirement

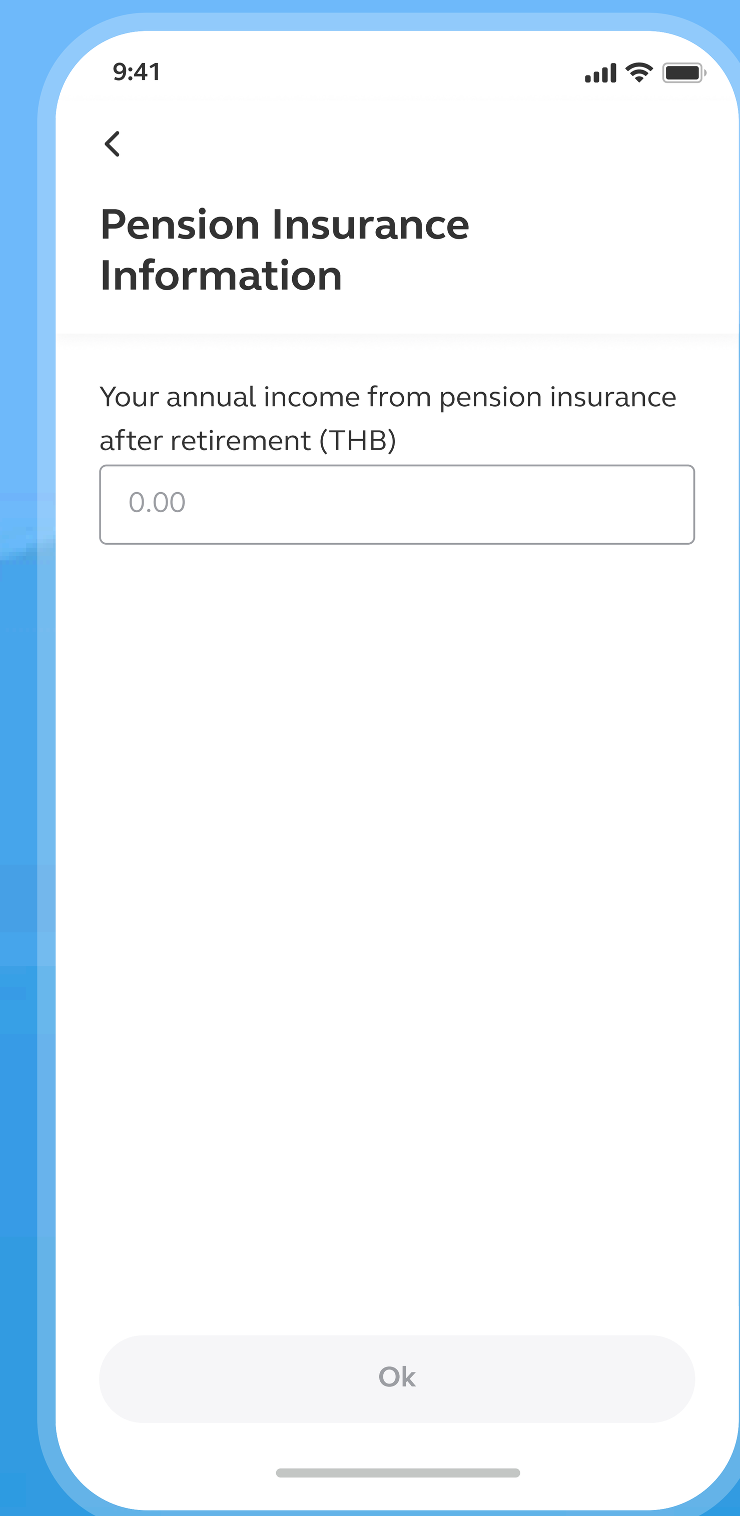
1: Mutual Fund Unitholders cannot edit the investment value with Principal TH
2: Display for users without mutual fund with Principal TH

Plan Wise Retire Well:
Edit Information

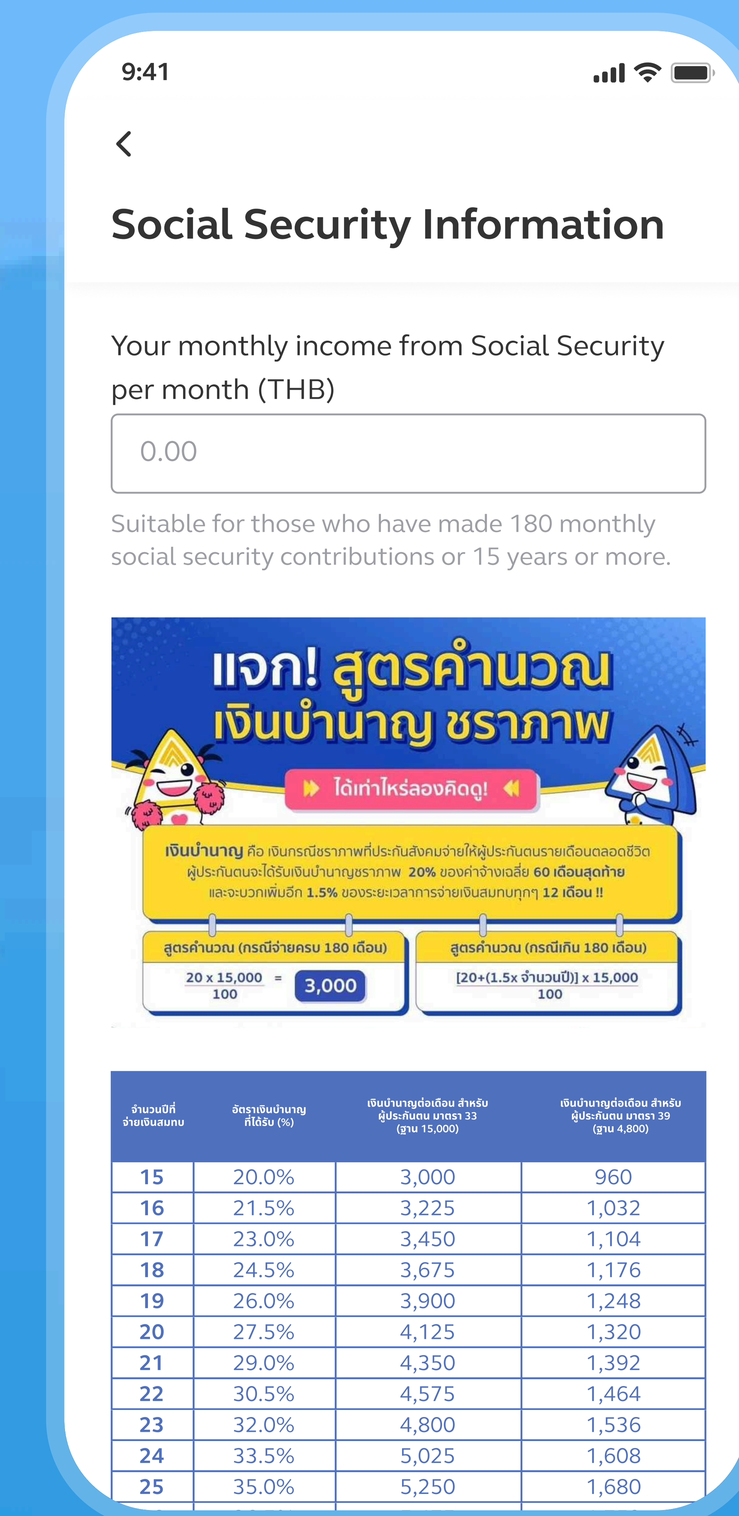
From the wellness score page, you can add/edit any information that you want to change.







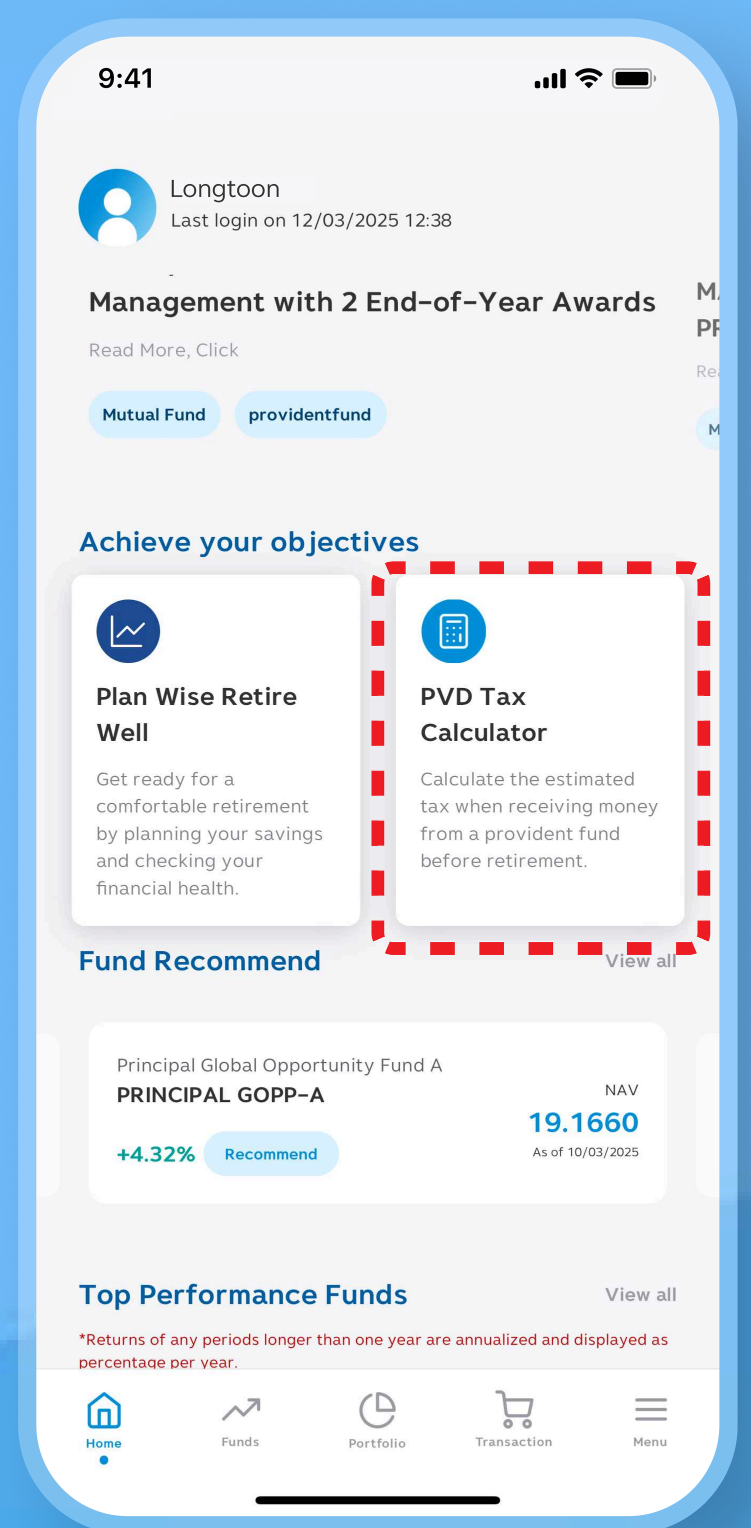
Edit pension insurance Information

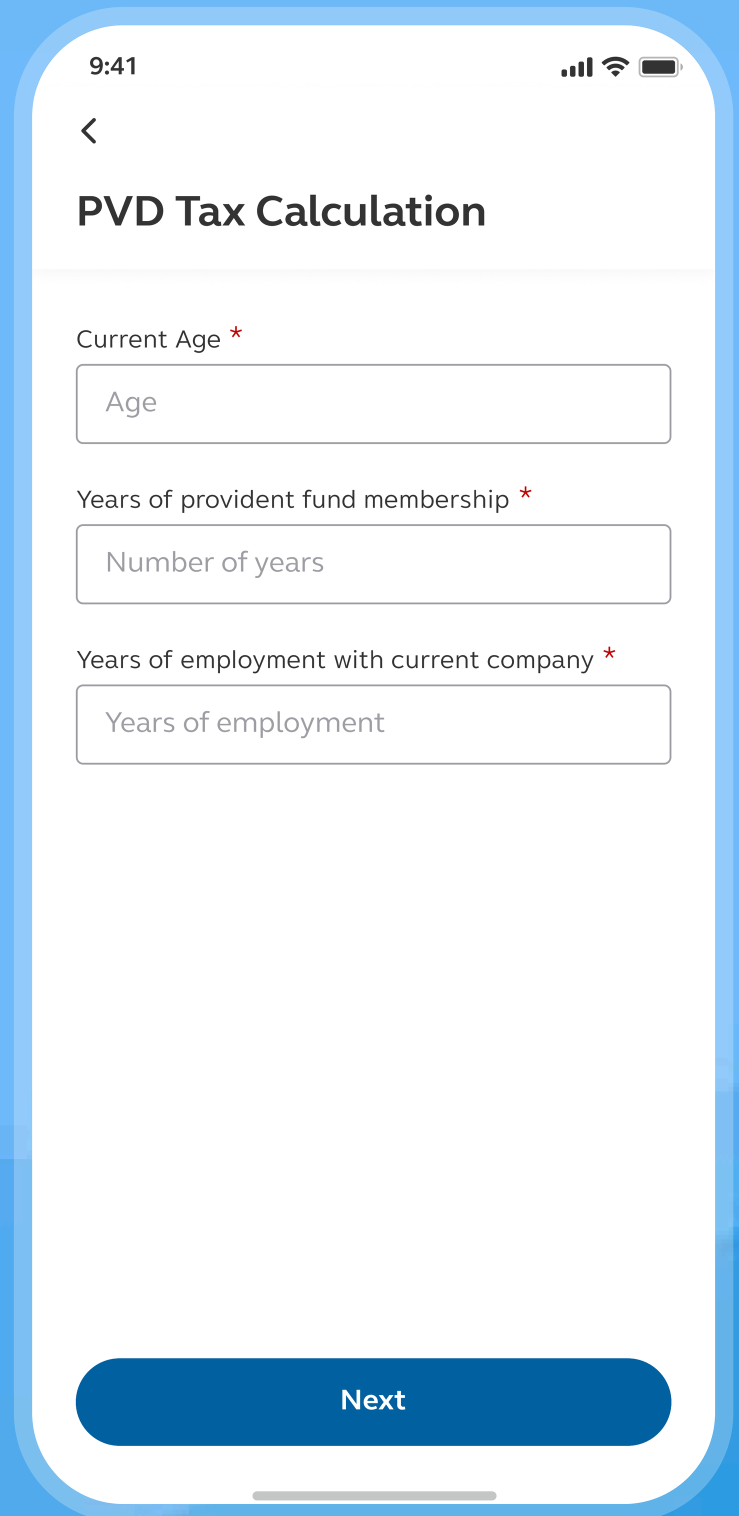


Edit social security information

PVD Tax Calculator

PVD Tax Calculator





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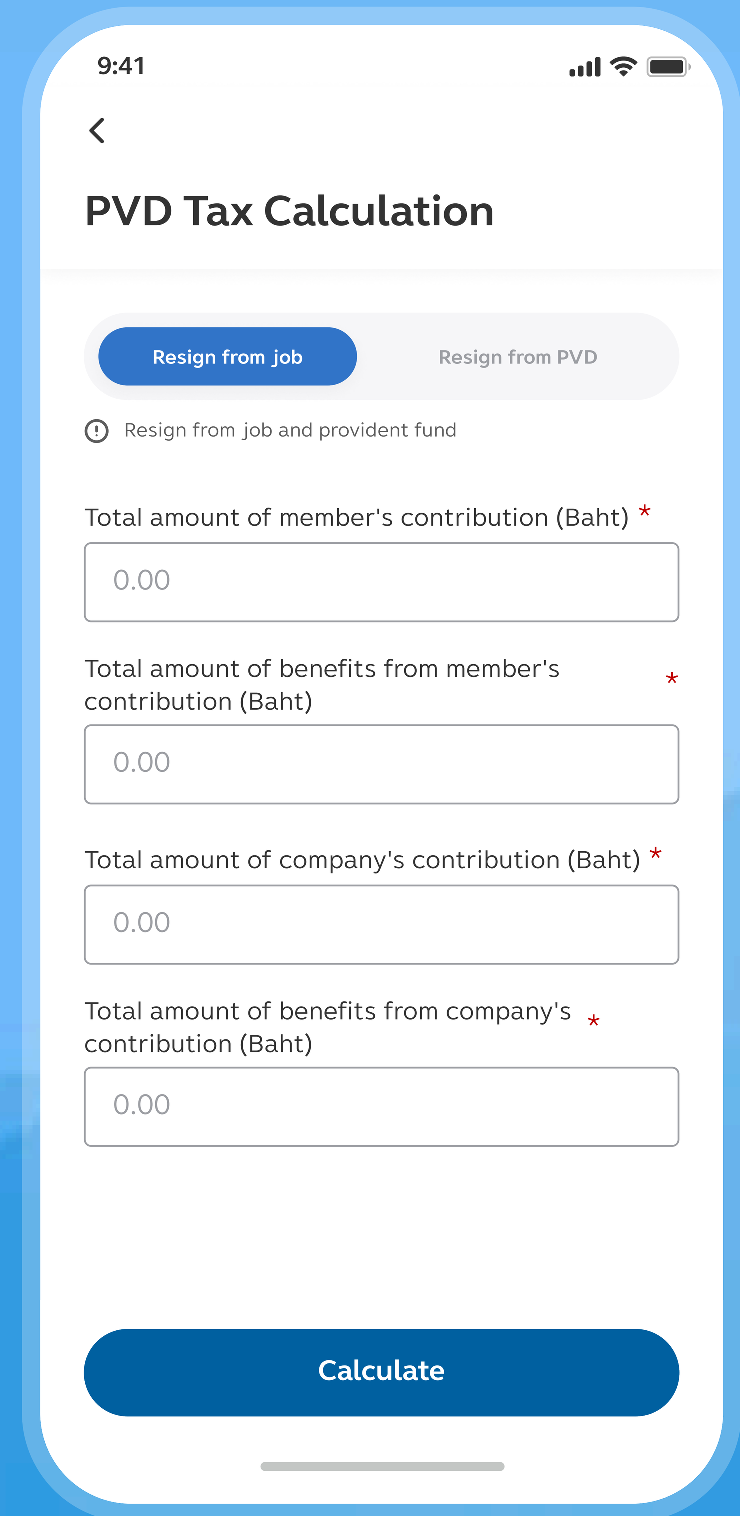

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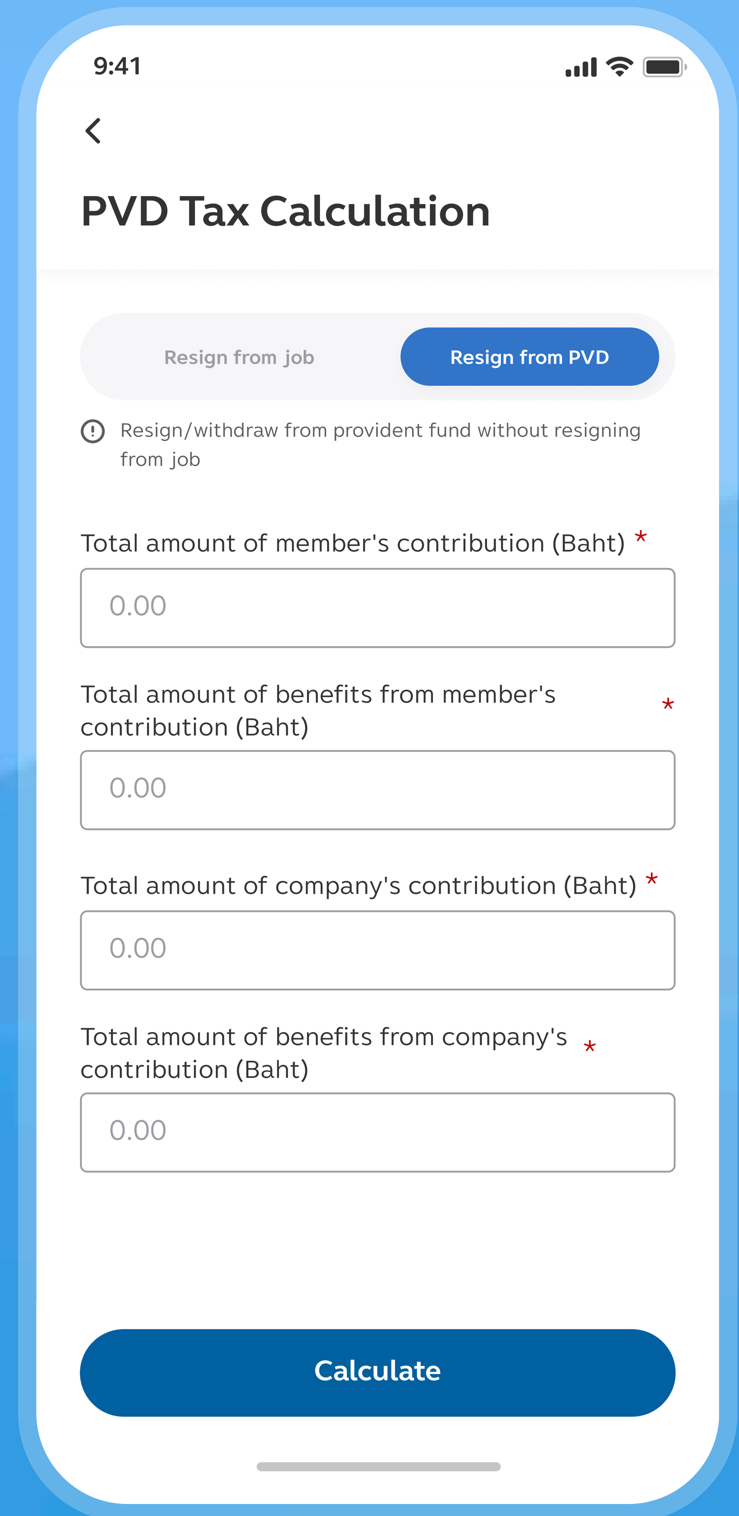

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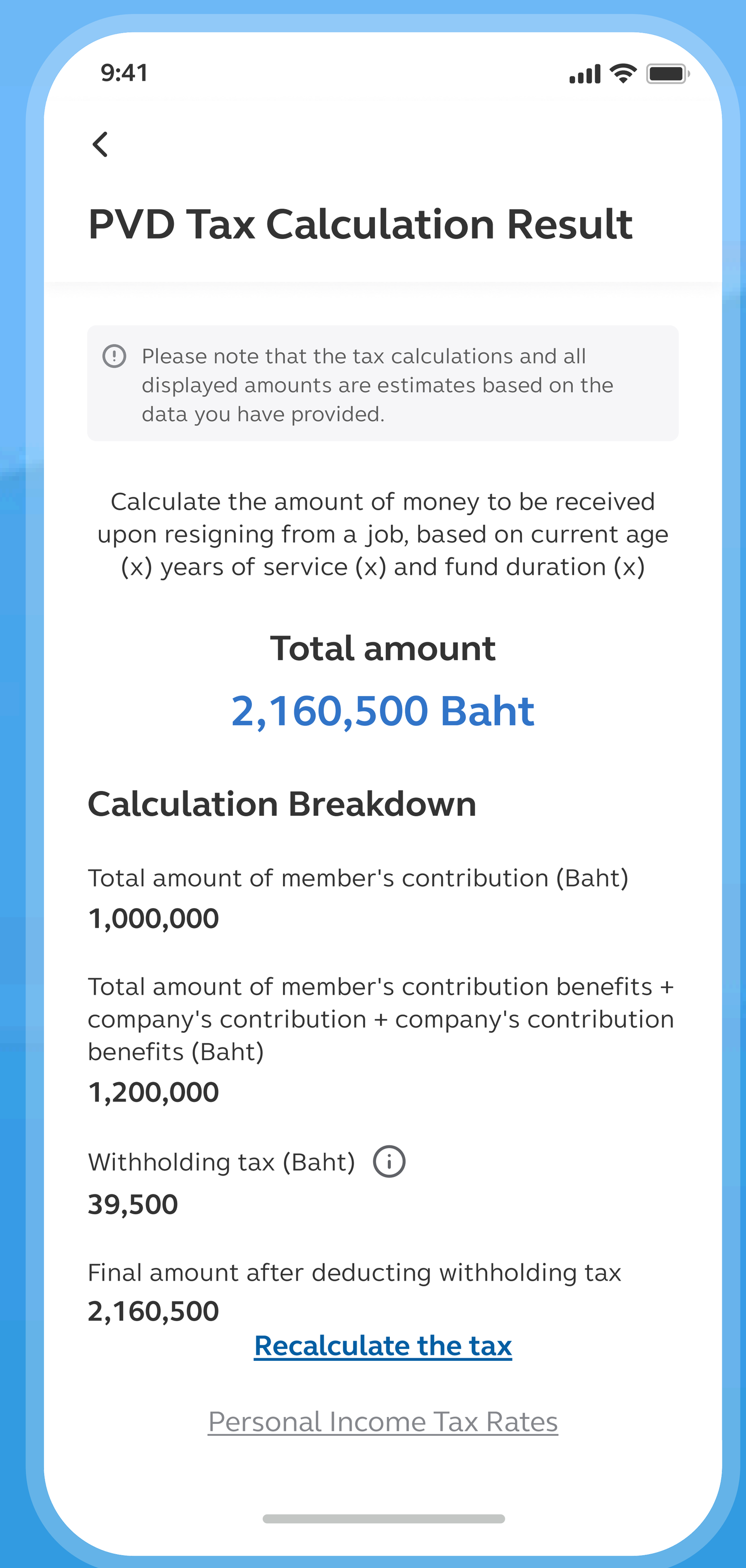

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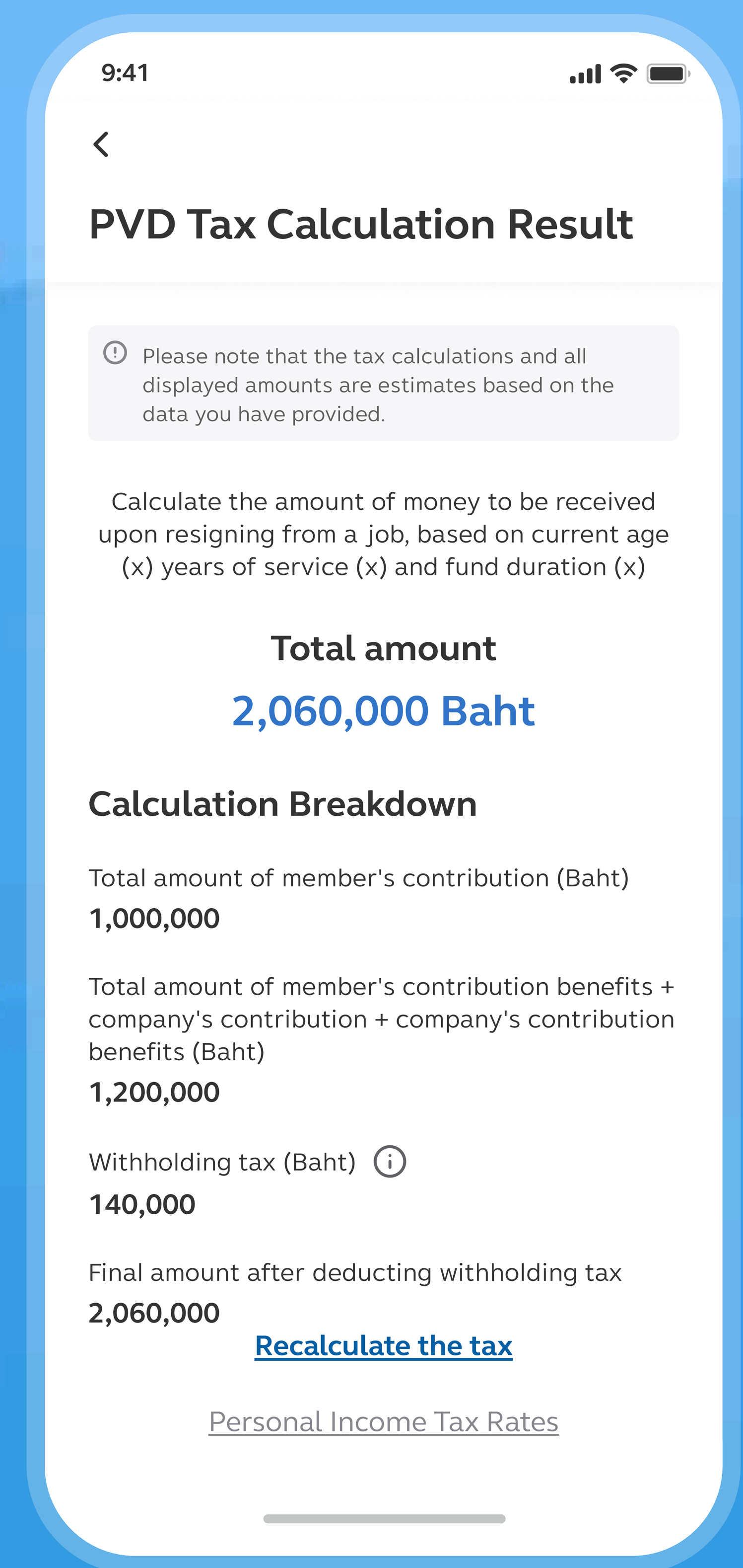


1. Click
"PVD Tax Calculator"

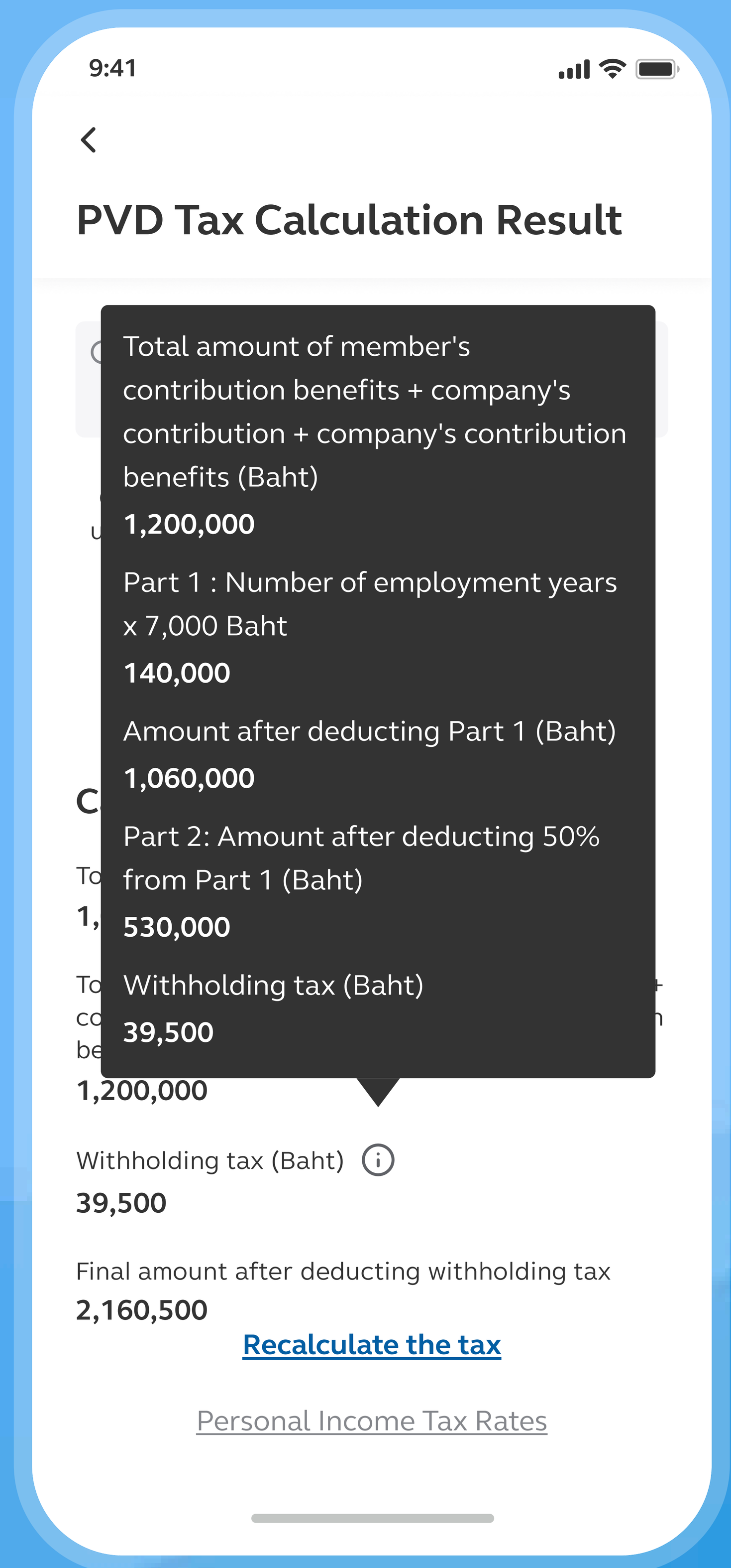
2. Fill in the personal information and click "Next"

3.Fill in the provident fund information and click "Calculate".
1: Member resigning from job
2: Member resigning from PVD

4.1 Tax Calculation Results
1: For cases where the period of service is more than 5 years
2: For cases where the period of service is less than 5 years

PVD Tax Calculator

①



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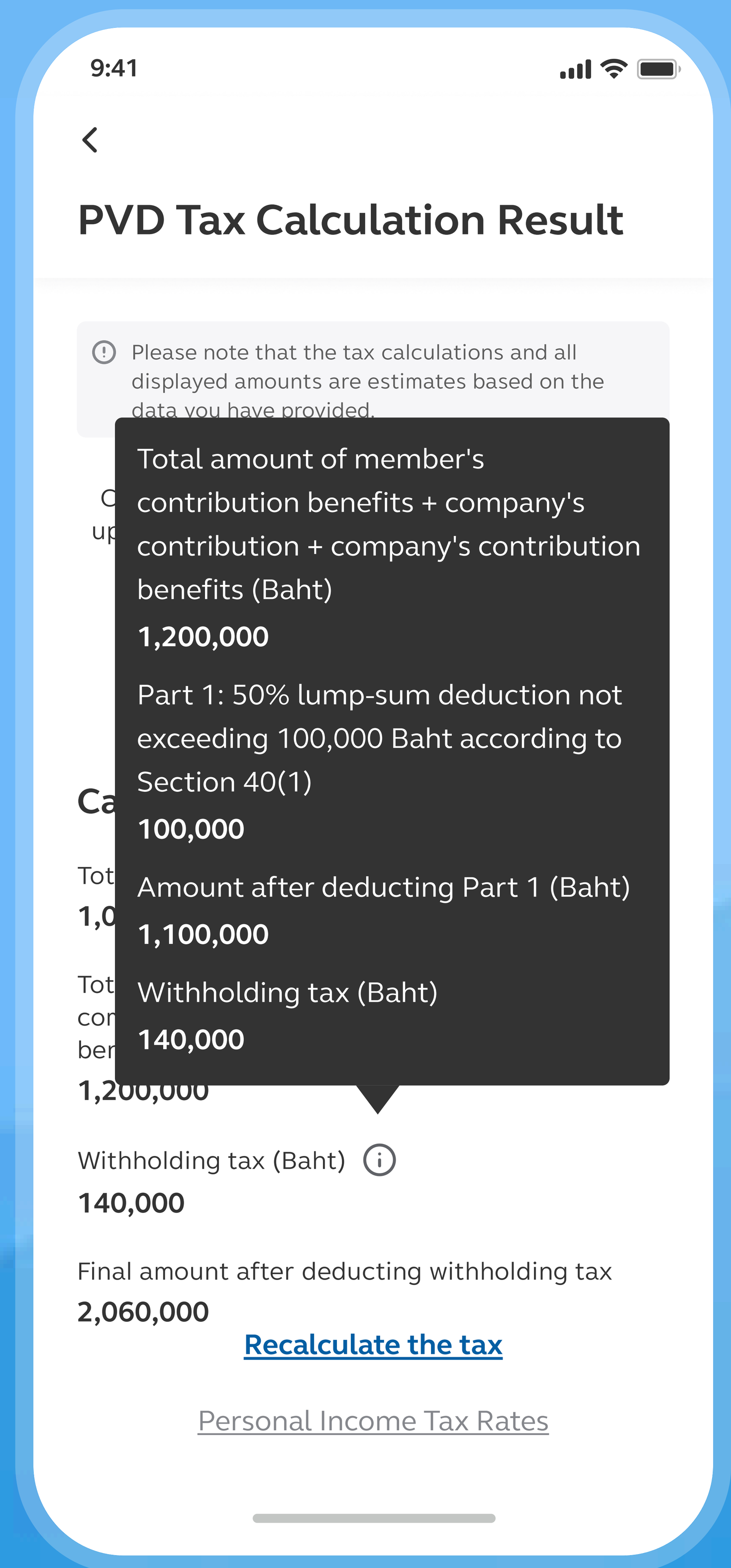

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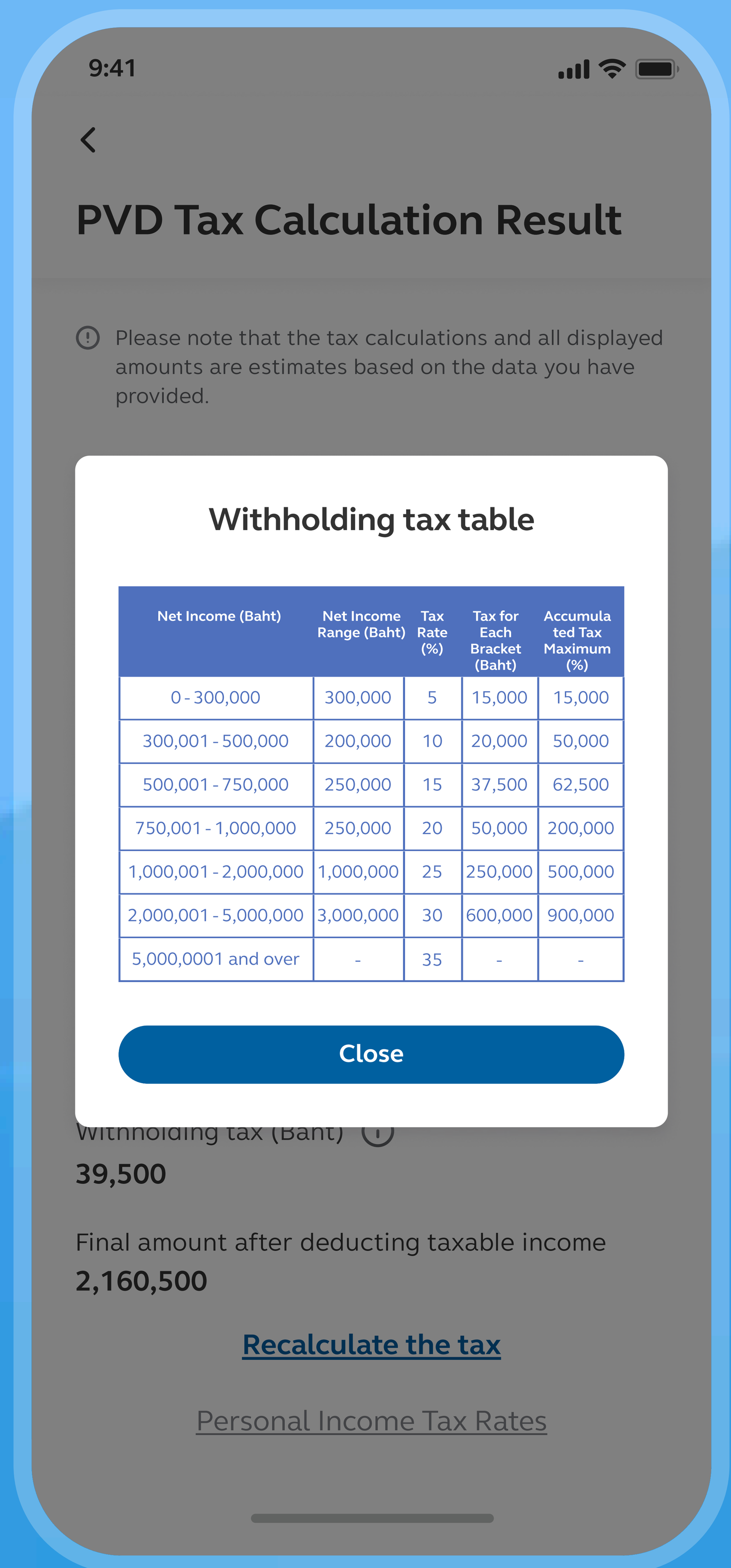

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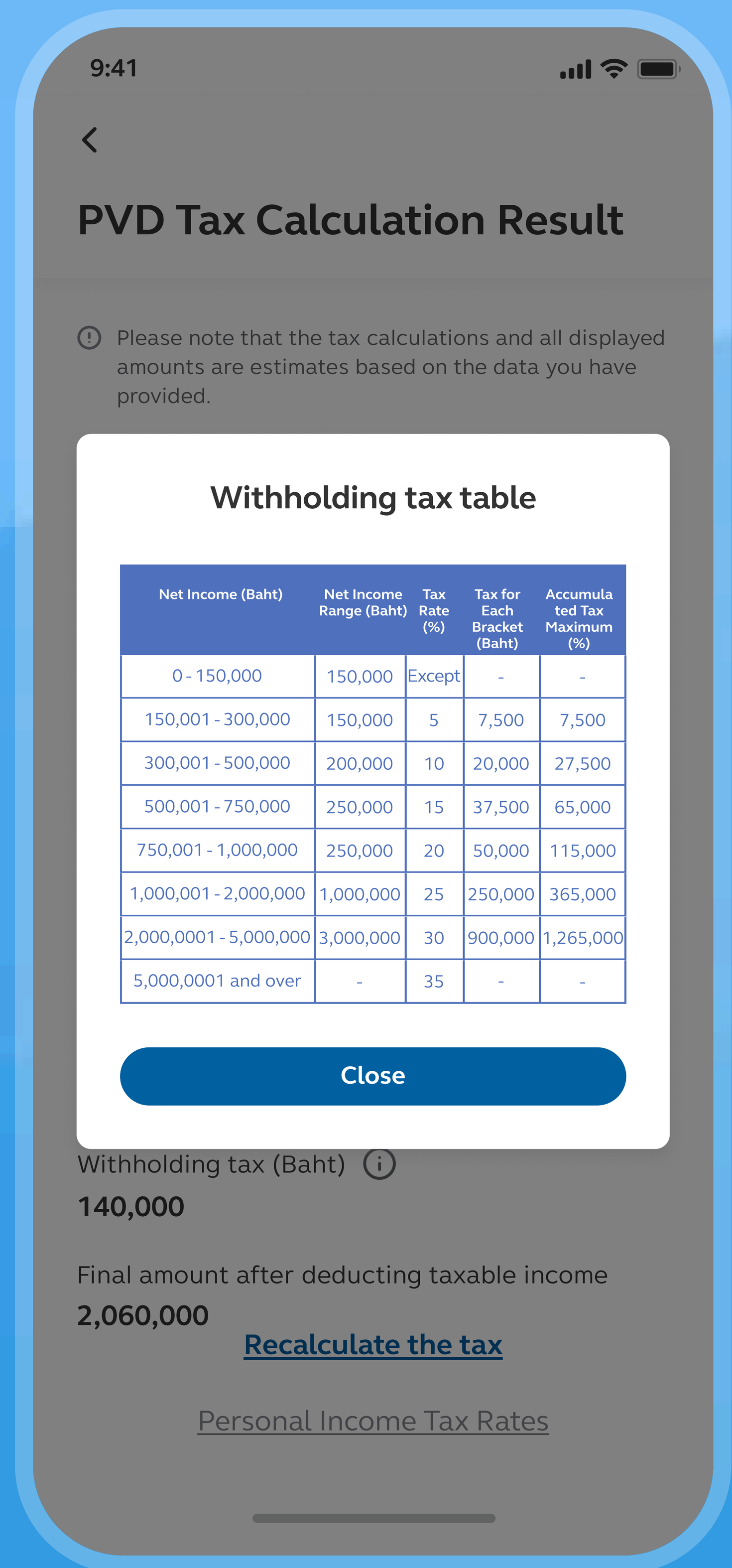

4.2 Tax Calculation Method
1: For cases where the period of service is more than 5 years
2: For cases where the period of service is less than 5 years

4.3 Table Displaying Personal Income Tax Rates
1: For cases where the period of service is more than 5 years
2: For cases where the period of service is less than 5 years

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