enterprise Trustees

Enterprise Personal Pension

Sunnyside Plan

All you need to know to save towards your financial goals.



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What is the EPP Plan?

A flexible savings, investment and protection solution designed to help you build wealth, secure your future and protect what matters most; today and tomorrow. Financial security is no longer just about retirement; it's about living confidently at every stage of life.

The Enhanced Enterprise Personal Plan (EPP) is an innovative financial planning solution that combines:

- *Flexible savings*
- *Top-tier investment management*
- *Built-in insurance protection*
- *Digital convenience*
- *Future income planning*

The Enhanced Epp is a great tool for achieving financial hallmarks like; children and personal education, buying a house, starting a business and generational wealth creation.

Why the Enhanced EPP Plan Stands Out

1. Save as little or as much as you want, whenever you want.

2. Enjoy built-in life and hospitalization cover on selected plans.

3. Designed for Every Worker

Perfect for:

- *Salaried professionals*
- *Entrepreneurs / Self-employed individuals*
- *Informal sector workers*
- *Young professionals*

4. Contribute, monitor and manage your account anytime, anywhere.

5. Your funds are managed by experienced investment professionals under NPRA-approved policies.

Targeted savings and investment plan for individuals seeking higher returns and long-term capital growth. However, one may choose another plan that better aligns with their financial goals and risk appetite.

Sunnyside Plan

This plan is tailored for individuals with a higher risk appetite who aim to maximize returns and achieve long-term capital growth.

Ideal for:

- Young professionals
- Long-term savers
- Salaried professionals
- Individuals comfortable with market fluctuations

Key Features

- Higher growth investment strategy
- Long-term wealth accumulation
- Flexible contribution options
- Digital access & monitoring

Free built-in protection

- GHS 2,500 Life Cover *(Main life only)*
- GHS 1,500 Hospitalization Cover paid GHS50/day *(Main life only)*

Who Can Join?

Anyone aged 15-44, including:

- Formal sector workers
- Business owners
- Students planning early

How Your Money Grows

Our investment objective is to exceed the 182-Day Treasury Bill Rate by approximately 1.5% over time.

Historical performance:

- Average returns of approximately *18.05%* (subject to market conditions).

Investment decisions follow:

- NPRA regulations
- Approved Statement of Investment Policy
- Diversified asset allocation strategies

How do I sign up?

Via our shortcode *714*333#
The Enterprise Advantage App
Online via https:
//my.enterprisegroup.net.gh/pension/personal-pensions-scheme/signup

Contribution

You decide:

- How much to contribute
- How often to contribute
- When to make additional payments

Contribution Frequency Options:

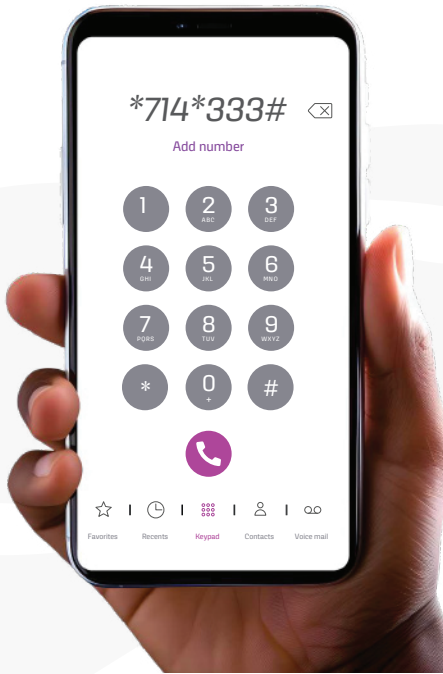
- Daily
- Weekly
- Monthly
- Quarterly
- Yearly
- Lump sum contributions

Easy Payment Options

USSD: *714*333#

- Enterprise Advantage App
- Mobile Money
- VISA / Debit Cards
- Employer payroll deductions
- Auto-debit arrangements

Contribute anytime - 24/7.



How do I contribute to my Sunnyside Plan?

To contribute via USSD follow these steps

(Number registered with your Sunnyside Plan Account)

- *Dial *714*333#*
- *Select Option 3 (Contribute)*
- *Enter your pin or create your pin if its your first time*
- *Select your EPP Plan Member ID*
- *Select Mobile Money*
- *Enter amount to pay*

To contribute via the Mobile/Web App follow the Steps below:

- *Click on "Make Contributions" on the Pension home page*
- *Enter phone number or email*
- *Enter your access code (If you have one) or click reset access code to login*
- *Enter access code received in your mail or message box*
- *Create password with 4-digit access code or enter a preferred 4-digit code and click continue*
- *Go to the Pensions tab on the Policy center page and click on contribute*
- *Click on "Make contributions" underpreferred Membership ID and follow prompt*

Alternatively, you can contribute by setting up an auto-debit on your mobile wallet or electronic card (VISA).
Arrangements can also be made with your employer for source deduction.

Can I transfer other Saving funds and Investments into my Sunnyside Plan?

Yes.



How do I check my contributions?

You can dial *714*333# to receive a summary statement

Download the Enterprise Advantage App via Google Play or App Store

visit the Web app: https://my.enterprisegroup.net.gh/.

Alternatively, log on to our member online portal 'The Stable' via https://thestable.etportal.app/portal/index to view your contribution statement.

You can also change your personal details and update your beneficiary information on the portal.

What benefits do I get?

- Meet your biggest financial goals
- 24/7 access to member online portal 'The Stable'
- We will keep you updated. You will receive sms and email on key happenings on your account.
- Enjoy a smooth and enjoyable benefit payment process
- Enjoy flexibility of payment mode, with our varied options for making periodic payments, and bulk payments.
- Expect to benefit from competitive real returns.
- Receive monthly account statements via email.

How much will I earn at the end of my chosen period of saving? The value of your fund depends on the following;

1. How much you contribute
2. How frequently you contribute
3. Investment returns
4. How long you contribute

Our trained team is available to advise you, taking into consideration, your monthly earnings and responsibilities, how much you can save periodically, and then build in our competitive interest rates to help project your savings and help you achieve your target savings.

When can I withdraw my contributions from the Sunnyside Plan? Full withdrawal is allowed on the scheme under the following conditions

- *After 36 months of savings*
- *Retirement (Sixty (60) years)*
- *Early Retirement (55 years)*
- *Permanent disability*
- *Emigration*

What happens if a member passes away before claiming their Sunnyside Plan benefit?

If a member should pass away before claiming their benefits, a lump sum equal to the value of their contributions and investment returns will be paid to their nominated beneficiaries. It is there important to frequently review your nominated beneficiary list and keep it current at all times.



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Your Advantage



Enterprise Trustees, Your Advantage!!!

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