

Service standards

Services	Delivery standards
Plan sponsor	
Quarterly investment newsletter	Within six to eight weeks following the end of the quarter.
Processing of contributions	Invested on the same day if money and contribution information are received no later than 4:00 p.m., Eastern time, on a business day; money and/or contribution information received after 4:00 p.m. will be processed by the end of the following business day.
Enquiries	Verbal or written response within one business day.
Monthly statements	Mailed and available online on the VIP room, if applicable within 15 business days of the statement closing date.
Members	
Toll-free, interactive Info-Line and password-protected VIP Room website	User ID and password provided within five business days of first deposit, or as decided by the plan sponsor.
Enrolment kits	<p>Provided within 10 business days following receipt of a request via email containing the following information:</p> <ul style="list-style-type: none"> ▶ Client number (RS_ _ _ _ _) and plan type(s) ▶ Quantities required (in English and French) ▶ Name and address of contact person for delivery
Statements	Mailed and available online on the VIP room, if applicable, within 15 business days of the statement closing date.
Enquiries	Verbal or written response within one business day.
Confirmation notices (for withdrawals, transfers, lump-sum contributions, etc.)	Sent within five business days of receipt of instructions.
Interfund transfers	Processed on the same day if request is received no later than 4:00 p.m., Eastern time, on a business day; requests received after 4:00 p.m. will be processed by the end of the following business day.
Tax receipts (Group RRSP and structured RRSP)	Within the delays prescribed by the <i>Income Tax Act</i> (Canada).
<ul style="list-style-type: none"> ▶ March-December contributions ▶ Contributions for the first 60 days of the year 	
Tax slips (non-registered plans - T3, T5 slips)	By March 1 st .
Termination or retirement	Members will be contacted either by mail or by phone to discuss their options.
Settlements (for withdrawals, transfers, forfeitures, etc.)	Processed within three to five business days of receipt of all required documents.