

Requesting and downloading reports

You can request reports online through the VIP Room for plan sponsors. It's easy to use – you can choose parameters for the data based on your needs, and save the reports for future reference.

To request reports, go to the Group Savings & Retirement VIP Room and log in with your User ID and password.

If you have access to more than one site and wish to only have one User ID, click on the *Manage my profile* tab on the login screen.

Need a User ID and password?
Call your Customer Service Representative at 1-800-242-1704 to obtain the necessary form.

From the main menu, select *Reports*.

Note: The instructions provided by your Internet Authorized Signing Officer will allow us to provide you with the appropriate access.

Standard Life VIP Room Help | FAQ | Contact Us | Français | [Return](#) | [Logout](#)

ABC COMPANY RS100000

Home | Contributions | Administration | Governance | **Reports**

Contributions

You have two options for submitting contributions to your group program (please note that transactions completed after 4:00 p.m., Eastern time, will be processed the following business day) :

- Use a previously submitted list
- Provide a new Excel spreadsheet

What's new?

Administration

Pre-enrolment
Set up a member for enrolment to your group program.

Manage members

Enter a name, social insurance number or certificate number to view, update or terminate a member account.

Banking information
Create, update or delete a bank account.

Interactive messaging
Use our secure mail service to exchange information.

[More options »](#)

Governance

Plan investment options
View and print the latest quarterly fund reviews.

CAP Governance
Access reference material for your Capital Accumulation Plan (CAP).

[More options »](#)

Reports

Download reports
You have 2 new reports ready for download
View your reports.

Plan financial information
Obtain plan-related information such as asset balances, fund performance, rates of return as well as interest rates and unit values.

Member financial information
Request member reports relating to contributions, withdrawals, assets and more.

Member non-financial information
Find reports on member personal information, account status and missing information.

[More options »](#)

Plan for life™ program

[Discover more](#)

Get online training for new functionalities.

eLearning

Related links

[Legislation & investments](#)

[Financial Centre](#)

[Forms & reference guides](#)

You can obtain a variety of reports:

Plan financial

- Asset balance (by fund and account)
- Fund performance (by plan and subgroup)
- Rates of return (by plan and account)
- Interest rates & unit values

Member financial

- Member with assets in a specific fund
- Member with guaranteed fund maturing in 3, 6, 12 months
- Total assets by member
- Contributions by member
- Withdrawals by member
- Reconciliation report by member
- Reconciliation report by member/plan and account

Member non-financial

- Non-financial member information – Personal data
- Non-financial member information – Plan information
- Members turning age 71 within the current year
- Missing member information report

Miscellaneous

- Internet transaction report
- Number of members accessing VIP room
- Client specific report

Do you have reports you would like to see on this site?
Click here to let us know.

The screenshot displays the Standard Life VIP Room interface for ABC Company. The page features a navigation menu with 'Reports' selected. A central content area lists various report categories: Download reports, Plan financial information, Member financial information, Member non-financial information, Miscellaneous reports, and Suggest a report. A sidebar on the right shows a woman holding a folder with the text 'We take care of the heavy lifting so it's easier for you to achieve your objectives.' The footer contains navigation links and a copyright notice for Standard Life.

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Standard Life ABC Company RS100000

Home Contributions Administration Governance **Reports**

For demo purposes, the results shown reflect sample data.

Reports

- Download reports**
You have 2 new reports ready for download
View your reports.
- Plan financial information**
Obtain plan-related information such as asset balances, fund performance, rates of return as well as interest rates and unit values.
- Member financial information**
Request member reports relating to contributions, withdrawals, assets and more.
- Member non-financial information**
Find reports on member personal information, account status and missing information.
- Miscellaneous reports**
Access various reports to help you manage your group program.
- Suggest a report**
Click here to send us comments or suggestions on future reports you would like to see on this site.

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We take care of the heavy lifting so it's easier for you to achieve your objectives.

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Standard Life ABC Company RS100000

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Plan financial information

Asset balance (Report content)
Obtain asset balances by fund and account.

Fund performance (Report content)
Obtain fund performance figures by plan and subgroup.

Rates of return (Report content)
Obtain rate of return figures by plan and account.

Interest rates & unit values (Report content)
View interest rates and unit values.

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Select a plan and subgroup, specify a date and submit your request.

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Standard Life ABC Company RS100000

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For demo purposes, the results shown reflect sample data.

Asset balance

Select a plan
STRUCTURED RRSP (STRP) ▼

Select a subgroup
1 - EXECUTIVE ▼

Specify a date (yyyy/mm/dd):

as of today

OR

as at:

[Submit](#) [Reset](#)

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Click on the confirmation number to access your report right away.

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For demo purposes, the results shown reflect sample data.

CONFIRMATION

Standard Life is processing your request. 🖨️

You can retrieve your processed request by clicking on the available link in the following table. If you don't get an answer after short waiting time, you may retrieve your processed request by clicking on the **'Download results / reports'** link. All files will be kept/saved for up to a maximum of 45 days following the request date.

Please print this page for your records. If you have any questions about your request, **'Contact Us'** and quote your confirmation number.

Confirmation number	Result/Report type	Detail
103671	Asset balance	STRUCTURED RRSP (STRP) for 1 - EXECUTIVE as of today

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To download your reports:

From the main menu, select *Download reports*.

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 Discover more

Related links
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 Financial Centre
 Forms & reference guides

To view a report, click on the link matching your confirmation number.

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Standard Life ABC Company RS100000

Home Contributions Administration Governance **Reports**

For demo purposes, the results shown reflect sample data.

To save your data, please click on one of the links available under the Results/Reports Type column. To obtain more information on how to access your Results/Reports, please click here.

Reports

Results (Page 1 of 1)

Date of the request	Confirmation number	Results/Reports type	Size	File format
2009/01/26 05:47:40 PM	103674	Asset balance	2 KB	CSV
2009/01/19 04:46:44 PM	103651	Fund performance	112 KB	PDF
2009/01/12 03:31:11 PM	103625	Asset balance	2 KB	CSV
2009/01/12 12:49:34 PM	103618	Total assets by member	4 KB	CSV
2009/01/05 05:37:09 PM	103610	Asset balance	2 KB	CSV
2009/01/02 11:03:46 AM	103609	Asset balance	2 KB	CSV

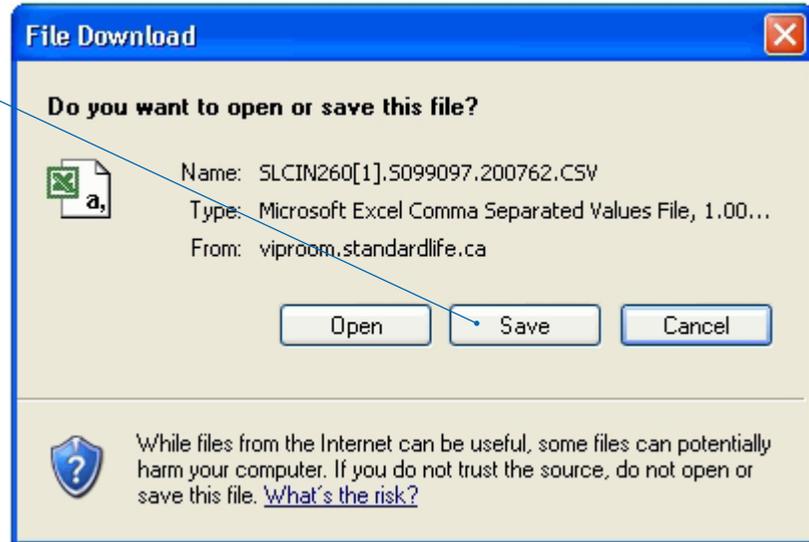
Statements

You have no statement to download at this time.

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Click *Save* to save the file to your server or disk.



To format your file in Excel:

In Excel, open the file that you just saved.

Note: Files of type must show *Text Files (*.prn, *.txt, *.csv)* since the file extension is CSV.

Your report will then be displayed in the Excel active spreadsheet.

Your Windows settings may require that you format your CSV file in order to open it. To do so, follow these steps:

- Select the *Delimited* option and click on *Next*.
- From the *Delimiters* menu, select *Semicolon* and click on *Next*.
- Click on *Finish*. Your report will be displayed in the Excel active spreadsheet.

