

“have a seat,
let’s chat...
...the service here
is excellent.”

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your morning coffee break

Administrator's Corner

"How do I find out when my client's annual fee is due ?"

Log into CWeb: under **Summarized Reports:** click on **View cash balances** in all accounts. This will produce a report sorted by Account Number and contains a **Fees Due Date** field which outlines the month/day/year your clients's fees are due.

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CANADIAN WESTERN TRUST

Dear ,

Month Day , 2006

Client Over-contributed to a RRSP?

Don't worry; it's a fairly common oversight. However, the urgent issue is dealing with it correctly and quickly to avoid the 1% per month tax penalty set by Canada Revenue Agency ("CRA") on excess contributions. Here are some general guidelines to assist you.

[For the complete Article click here](#)

What is your time worth?

The advent of a paperless society has most of us awash in a fountain of information, data, work and YES - even paper. Following are a few specific examples of items that may drain your most valuable resource – time (and how CWT can help):...

[...have we got your attention? Click here for more.](#)

Self-Directed RSP contest for Independent Financial Advisors

[And the new account contest winner is....](#)

Contact us

Canadian Western Trust welcomes your inquiries. To help us respond quickly to your inquiry, request for an information kit, or if you wish to provide feedback, please fill out our [Information Request Form](#).

Visit us at: www.cwt.ca

Please feel free to contact our **Relationship Management Team** at any time at the following numbers:

Toll Free: 1-800-663-1124

Local: 604-685-2081

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