

Jacqueline Poissant joins CWT as Director of Business Development for B.C.!

In her role, Jacqueline is responsible for increasing the sale of services to the Independent Financial Advisor community. Prior to joining CWT, Jacqueline was a very successful Financial Advisor in her own right, bringing an inspiring 16 years of direct experience to the position.

Jacqueline and the rest of our qualified team of regional Business Development Directors succeed by delivering quality service and unrivaled client satisfaction.

Sales Directors

B.C. Region

Jacqueline Poissant
600 - 750 Cambie Street
Vancouver, BC, V6B 0A2
Direct: 604.699.4855
Toll Free: 1.800.663.1124
jacqueline.poissant@cwt.ca

Alberta Region

Thaidra Walsh
200 - 606 - 4th St SW
Calgary, AB, T2P 1T1
Direct: 403.291.5268
Toll Free: 1.888.894.2331
thaidra.walsh@cwt.ca

Prairie and Central Region

Joe Woitas
230 Portage Ave
Winnipeg, MB, R3C 0B1
Direct: 204.947.5590
Toll Free: 1.866.947.5590
joseph.woitas@cwt.ca

Ontario

Erik Begg
201A - 3190 Harvester Rd
Burlington, ON, L7N 3T1
Direct: 905.631.8487
Toll Free: 1.877.829.3101
erik.begg@cwt.ca

Having trouble with CWeb?

Canadian Western Trust has developed a User Guide for CWeb!

The Guide provides step-by-step instructions on how to log-in, change your password and find client information.

To request a copy of this User Guide, please email marketing@cwt.ca.

Addendums for Locked-In accounts now available on CWeb!

You asked, we listened!

All Provincial and Federal Addenda for LRSPs, LIRAs, LIFs, LRIFs and PRIFs are available on CWeb.

[Click here](#) to log in to CWeb, follow the link for "CWT Forms and Link" and scroll down to print the required form!

Would you like to see your name in print?

CWT is always looking for newsworthy and informative articles!

Please send your articles to jesse.cardinal@cwt.ca.

CWT may be small in size, but we are BIG on service...\$4 Billion big to be exact!

On July 17th 2007, Canadian Western Trust surpassed \$4 Billion in Assets Under Administration!

Assets under administration at CWT have increased tenfold since it was acquired by Canadian Western Bank in 1997, and have more than doubled over the past three years.

We would like to say a big "Thank You" to everyone that has supported CWT in our years of growth.

71 is the new 69!

In the recent Federal Budget, the RSP maturity age was increased from 69 to 71 years.

CWT's Richard Tebb explains how minimum payments and contributions will be affected by this change.

[Click here](#) to read on!

To Split or Not to Split?

CWT's Richard Tebb looks into **Pension Income Splitting** that may lead to pensioners paying less tax.

[Click here](#) to read on!

Product Information: Individual Pension Plans not just "Super-Sized" RSPs!

Individual Pension Plans are gaining popularity, with many executives and entrepreneurs choosing to invest their retirement savings in such accounts. Many employers are also offering this option to attract and retain talent. Some benefits that IPPs have over RSPs include:

- Larger contributions allowed for past, current and future service
- Additional contributions if plan has a deficit
- Potential for Terminal funding
- Creditor protection

Canadian Western Trust offers cost-effective and competitive IPPs. [Click here](#) for more information or call our Relationship Management Team at 1.800.663.1124!

CWT's Service Spotlight

Transferring accounts to Canadian Western Trust is now easier and faster due to **ATON!** Account Transfer Online Notification is a real-time, electronic service that reports and confirms client account transfer information between two financial intermediaries and allows users to challenge asset details and make corrections in a more time-efficient manner.

The vastly improved transfer rate of this service (3-10 business days) and CWT's **Advisor in Transition Program** (assistance with exit fees) make it a great time to move your book of business to a CWT low cost [Introductory Account](#) (FundSERV Mutual Funds only), the cost-effective [Fee For Service Account](#) or [any other account offered by CWT](#).

To find out more about CWT's Advisor in Transition Program, the Fee for Service Account or the Introductory Account please contact our Relationship Management Team at 1.800.663.1124.

Administrative Corner

CWeb has been updated with links for often-used forms! Some highlights include:

- The same Withdrawal form can now be used for RSPs, RIFs or Investment Accounts
- The new Pre-Authorized Debit form can now be used for Fee for Service accounts, to contribute to an RSP, for Investment Accounts or pay the annual trustee fees
- The new Visa/MasterCard Payment Form gives the option of subsequent annual trustee fees to be changed automatically to the same card

New account application forms for Registered and Investment Accounts are also available at www.cwt.ca. [Click here](#) to be redirected to the web page!

THANK YOU for dealing with CWT, we appreciate being your "trust company of choice." We hope this newsletter offers value to your business and we appreciate any feedback.