

Happy Holidays!

As we count down the last few days of 2009, Canadian Western Trust would like to wish you the best for a joyous season and a very happy new year!

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Admin Corner

For annual account administration fees, CWT offers 3 payment options:

- 1) Send a [Pre-authorized Debit Agreement](#) to CWT.
- 2) Place a mutual fund redemption order over FundSERV.
- 3) Send a cheque to CWT.

Your 2010 Wish List

Send your 2010 Wish List to cwt.marketing@cwt.ca and tell us what we can do to help your business thrive in the new year!

Alternatively, you can contact the CWT Sales Director in your region to discuss new business opportunities for 2010.

CWT 2009 ~ Year in Review

Check out the list below for key milestones and achievements that Canadian Western Trust ("CWT") and our parent company, Canadian Western Bank ("CWB"), have reached in 2009.

CWB signs agreement to acquire National Leasing Group Inc.

National Leasing Group Inc. specializes in commercial equipment leasing and is the largest privately held lessor for small to mid-size transactions in Canada. Click [here](#) to read the full press release.

CWB reports record net income and total revenues for fourth quarter and fiscal 2009

Highlights include the achievement of record net income and total revenues and CWB's 86th consecutive profitable quarter. Click [here](#) to read the full press release.

CWT establishes new internal benchmark, surpassing \$5.0 billion AUA

"At a time when challenging economic conditions are front page news, it is refreshing to announce that CWT continues to grow both assets under administration and its client base," says Scott Scobie, General Manager of CWT. Click [here](#) for the full news release.

CWT launches the "Bundled IPP" product!

CWT has partnered up with IPP INC. to offer a "bundled" solution for Individual Pension Plans ("IPPs"), featuring a step-by-step guided process, a competitive fee structure and superior service. Click [here](#) to learn more about the "Bundled IPP"!

CWT is appointed bare trustee by Raymond James Ltd.

CWT has been appointed as trustee for all self-directed registered and education savings plans administered by investment dealer Raymond James Ltd. Click [here](#) to read the full press release.

CWB celebrates 25 years of success!

CWB first became a Schedule I chartered bank on March 22, 1984. In 2009, it celebrated 25 solid years of business, alongside its subsidiaries Adroit Investment Management Ltd., Canadian Direct Insurance Inc., Valiant Trust Company and Canadian Western Trust Company! Click [here](#) to read the full story.

CWT opens a new office in Toronto

CWT opens a new office in Toronto to better service its clients in Ontario and Atlantic Canada. Click [here](#) to read the full news release.

CWT launches Tax-Free Savings Account ("TFSA")

The TFSA is a flexible and tax-efficient registered savings plan that offers clients an opportunity to save for life events other than retirement. Click [here](#) to find out why CWT's Self-Directed TFSA offers even more flexibility!

Thank you for your support!

Even with market values of portfolios going down at the start of the year, CWT has been able to grow our assets under administration as more and more advisors like yourself realized the value in CWT's *Service You Can Trust*®.

We look forward to a very prosperous 2010 for you, your loved ones and your business!

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.