

James Anderson joins CWT!

CWT is very excited to welcome James Anderson as the new Business Development Officer for the BC region.

James brings with him over 12 years of experience in creating and managing client relationships in the financial planning industry. In his role, James will continue to build on CWT's successes in BC by furthering the organization's reputation as the trust company of choice for independent financial advisors, portfolio managers, mortgage brokers and individual investors.

Please contact James at 604.699.4855 or email james.anderson@cwt.ca for any new business inquiries in BC.

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Administrative Corner

RRSP to RRIF Conversion

As per Canada Revenue Agency rules, clients turning age 71 in 2010 are required to convert their RRSP account at CWT into a RRIF by year end.

Click [here](#) to find out how you can get a head start and expedite this process.

SWPs on CWeb

Systematic Withdrawal Plans ("SWPs") can be accessed and updated on CWeb under the *Scheduled Payments & SWPs* tab for RRIF/LIF-type accounts.

CWeb helps you pre-populate information onto our SWP forms, making the whole process more accurate and saving you time!

You can save even more time by specifying percentages on SWPs and letting the funds automatically adjust as soon as they get depleted.

Summer Sizzles at CWT!

While some clients are off enjoying their vacation, we know there are a lot of advisors still working hard through the summer months...and so is Canadian Western Trust ("CWT")!

CWT has recently hired a new Business Development Officer to service the BC region, released new enhancements to CWeb and stayed on top of the HST to keep you informed on changes to your clients' accounts.

Read the articles below for more information on CWT's latest work and also take a survey for a chance to win a \$100 gift certificate for a retailer of your choice!

CWT's Online Assistant Just Got Better!

Canadian Western Trust ("CWT") has recently made some new enhancement to CWeb, our online query tool.

Highlights of the new enhancements include *Batch Statements* and *Advanced Tracking for Transfers* - both designed to give you more control over your clients' accounts!

Click [here](#) to learn more about the latest enhancements and how you can get access to CWeb to utilize all of its great features.

CWT Offers Web Portal to HighView Financial Group™.

Canadian Western Trust ("CWT") is pleased to introduce a new web portal on [CWeb](#) to *HighView Financial Group™* ("HighView"), a leading provider of independent investment fund research and investment support tools for Advisors in Canada.

A new section called "Advisor Services" has been added on CWeb (grey panel on the right side below "What's New"). This section was created to provide Advisors with links to tools and resources that may be helpful in developing their business. It currently hosts a link to the HighView website.

Advisors accessing HighView's site through CWeb will also receive a special discount for HighView's Mutual Fund Research Subscription Packages.

To take advantage of this exclusive offer, please [sign in to CWeb](#). If you require CWeb access, please contact our Client Service Team at 1.800.663.1124 or email informationservices@cwt.ca

Share Your Thoughts About CWeb and You Could Win a \$100 Gift Certificate of Your Choice!

Canadian Western Trust's commitment to providing ongoing support to our clients, along with your feedback, has helped continue to make CWeb a useful and powerful tool that no advisor should be without.

Click [here](#) to complete a short survey by July 31, 2010 and you will be entered into a draw for a \$100 gift certificate of your choice!

Stay Informed: How HST Affects CWT.

Effective July 1, 2010, British Columbia and Ontario replaced the provincial retail sales tax with a single Harmonized Sales Tax ("HST") that combines the federal Goods and Services Tax ("GST") rate (currently set at 5%) with a provincial component for a combined rate of 13% in Ontario and 12% in British Columbia.

Residents of participating provinces will notice that Canadian Western Trust ("CWT") fees that were previously subject to GST will now be subject to the HST as of July 1, 2010.

Click [here](#) for details on how the HST will affect CWT accounts.

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.

