



Employer Update

For participating employers
of the CAAT Pension Plan

September 28, 2023



Welcome to our new team member



- Mushfique Ahmed
- Pension Analyst with Employer Services
- Three years of professional experience in pension administration and client services



Agenda

1. Plan growth update
2. Employer Manual redesign overview
3. End of Employer Attestations
4. Keeping members up to date
5. Plan Ambassador program
6. Improved Recruitment Toolkit
7. Upcoming events
8. My Pension update
9. Contribution remittance made easier

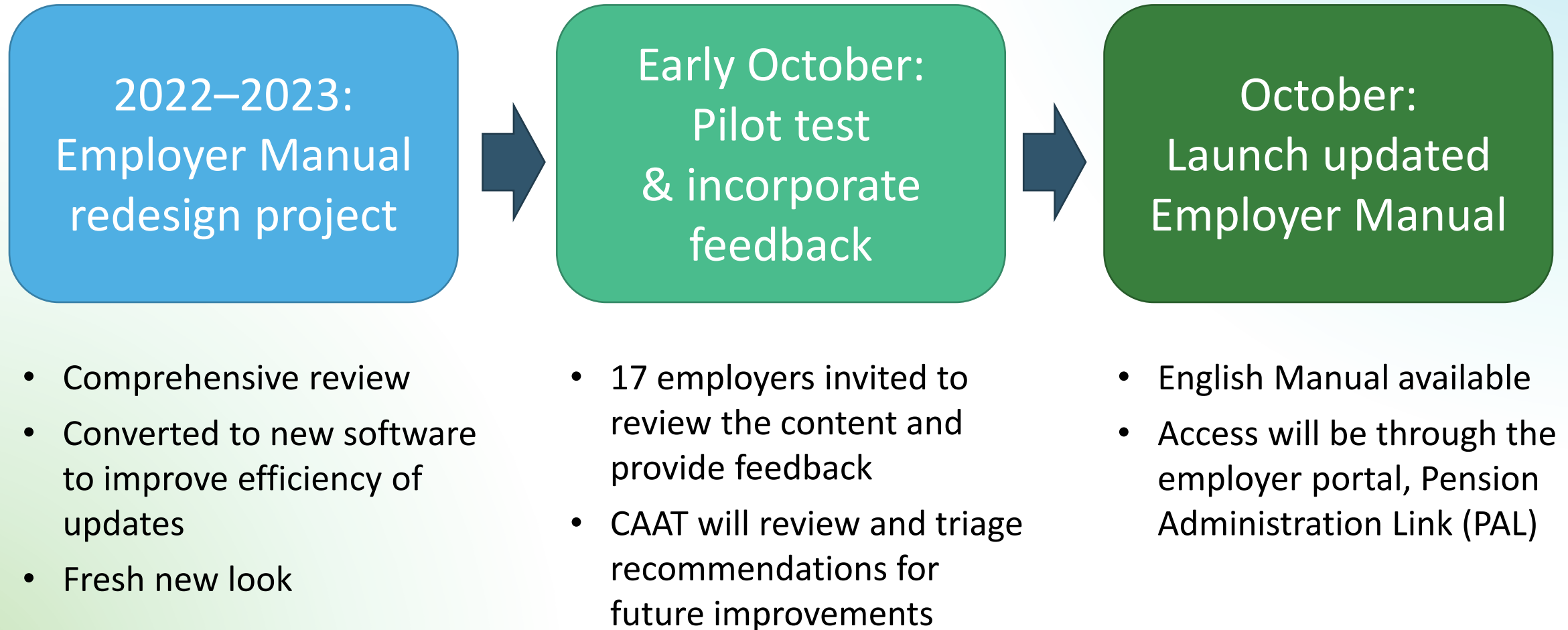
Growth update

- 52 new employers in 2023
- 31 employers through affinity agreement with Canadian Bar Insurance Association
- 2,700 new DBplus members
- 336 participating employers and growing!

We're excited about the future of the Plan



Employer Manual redesign



Employer Manual redesign

- Content divided into "segments" (versions) for three employer groups:
 1. College (+ any employer in the RCA)
 2. Non-college (with both plan designs)
 3. DBplus-only employers
- Content updated to meet accessibility standards (AODA compliant)
- Improved the approach used to advise employers about content changes
- Links to forms included within process descriptions plus a separate page for all forms, and also for calculators & tools
- Added employer portal (PAL) processes
- Added Intent-to-enrol process
- Added timeline for submitting age 71 pension requests
- Added employer education resources
- New FAQs section coming soon

Content improved to be clearer, more comprehensive and easier to use.



End of Employer Attestations

- An administrative compliance program operated since 2015, for participating employers with 200+ members
- No longer required as of January 1, 2024
- Aligns with CAAT's goal of simplifying processes

Member learning sessions

- Booking for Fall
- Webinar topics
 - A future you can count on:
Your CAAT Pension
 - Planning for retirement
 - Pension purchases
 - DBprime service purchases
 - DBplus pension purchases



Fall webinar series

Take a deep dive into all things pension



Visit the Members page of the CAAT website

www.caatpension.ca/members/planning-your-retirement/member-presentation



***Will our CAAT pension
cheque remain constant
each month regardless of
inflation?***



– CAAT plan member

Book a member webinar today

presentations@caatpension.ca



You can also follow us on Instagram!





- Help spread the message of Pensions for Everyone
- Receive the latest related research and other pension information in your inbox
- Get this great T-shirt!

Improved Recruitment Toolkit

Amplify your recruitment strategy and attract top candidates:

- Use the badge to signal you offer a valuable pension
- Add language and images to your existing recruitment materials
- Share the page for candidates with your interviewees



Use the Recruitment Toolkit to show that you're an employer of choice

Resources and upcoming events: Contributors podcasts and featured video



- 23 podcast episodes
- Special edition webcast: [The Marathon for Talent](#) featuring Dr. Susan Black, President and CEO of the Conference Board of Canada and Derek Dobson, CEO and Plan Manager, CAAT Pension Plan
- [ContributorsPodcast.ca](#)



Resources and upcoming events: Education sessions and resources

- Employer education sessions:
 - **October 26: Leaves and pension purchases**
 - 10 a.m. – for DBprime and DBplus
 - 2 p.m. – for DBplus only
 - **November 2: Pensionable earnings, contributions and pension adjustments**
 - 10 a.m. – DBprime and DBplus (also covers pensionable service)
 - 2 p.m. – DBplus only
- In Q4:
 - 2024 DCT Guide
 - Results of employer and member surveys



For employers who work
directly with CAAT

My Pension — a valuable tool for members

- More than 25,000 members have registered
- Gives members a way to engage with their pension:
 - Self-serve pension estimates in a few clicks
 - Secure Message Centre for any pension questions
 - Access to PDFs of annual statements
 - Option to update beneficiary designations

Watch for an email from your employer Pension Analyst to send to your members

My Pension — address verification

- New feature will offer auto-completion suggestions when a member starts to enter an address
 - Faster and easier for members
 - Improves accuracy of address data (complies with Canada Post criteria)
 - Applies to Canadian addresses only
- If a unit is required, the user should start with the unit followed by the street address

Address line 1 (Unit#-Street# Street Name)

110-1110 w
110-1110 Willow St Victoria BC V8X 3K2
110-1110 Walden Cir Mississauga ON L5J 4R3



Contribution remittance via PAL



- Although CAAT prefers EFT, if you send a **cheque** to CIBC Mellon, you can print your confirmation from PAL to accompany your cheque
- Whether you use EFT or cheque, be sure the **organization name** you provide with your submitted funds is the **exact same** as the name that appears on your participation agreement with CAAT
- Education sessions available on our website under **Employer Education Guide > Data reporting**



caat

PENSION PLAN