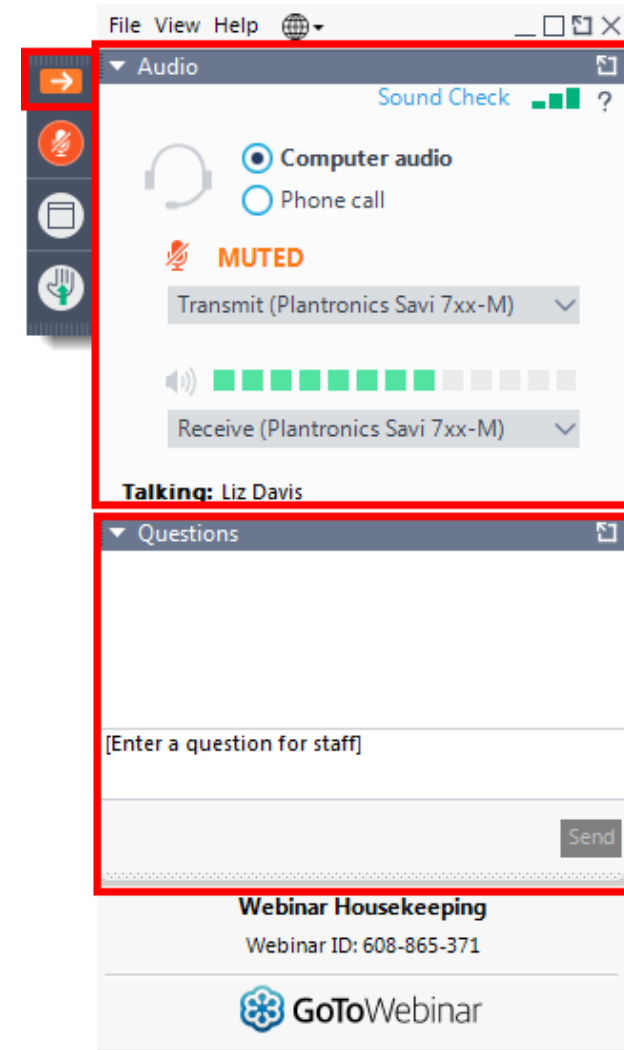


# While we wait – audio instructions

- Select the Audio section of the GoToWebinar control panel.
- Select Computer audio or Phone call.
- To submit a question or comment, type it in the Questions panel.



# Land Acknowledgement

“We acknowledge that our office sits on the traditional territory of many nations, including the Mississaugas of the Credit, the Anishnabeg, the Chippewa, the Haudenosaunee and the Wendat peoples, and is now home to many diverse First Nations, Inuit, and Métis peoples. We also acknowledge that Toronto is covered by Treaty 13 with the Mississaugas of the Credit.”

## Pronunciation

Anishnabeg: (ah-nish-naw-bek)

Haudenosaunee: (hoodt-en-oh-show-nee)

Métis: (may-tee)





# Employer Update

February 28, 2023



# Agenda

- Growth at the Plan
  - Contribution Remittances
  - Annual Data Collection
  - Annual Statement timeline
  - Employer Attestation
  - Member Learning sessions
  - Service standards – all of 2022 and Q4 2022
- Upcoming Events
  - Portal updates
  - LTD Pension Adjustments
  - June 30 Retirements

# CAAT Plan is one of Canada's fastest growing plans



## Growth in 2022

- 81 new employers
- 47 employers through affinity agreement with Canadian Bar Insurance Association
- + 1,700 new members

# CAAT Plan is one of Canada's fastest growing plans

## Growth in 2023

- 26 new employers
- 15 employers through affinity agreement with Canadian Bar Insurance Association
- 1,500 new members
- Increase membership with existing employers



# Contribution Remittances

- Reminder that starting with your January remittances, forms are to be sent to Employer Services at [employer@caatpension.ca](mailto:employer@caatpension.ca)
- No longer need to send the remittance forms to CIBC Mellon and CAAT Finance
- Please ensure that you are using the current [remittance forms](#) found in the employer manual.
- New: Please include your employer name in the subject line of your email
- **Coming soon:** Submitting your monthly remittances directly in PAL

# Contribution Remittances

Form Name	Where to Send	How to Send
CAAT RPP & CAAT RCA Contribution Remittance Summary (34-A)	CAAT Employer Services	Sdoc or via Message Centre in PAL
Purchased Pension Remittance (014-C)	CAAT Employer Services	Sdoc or via Message Centre in PAL

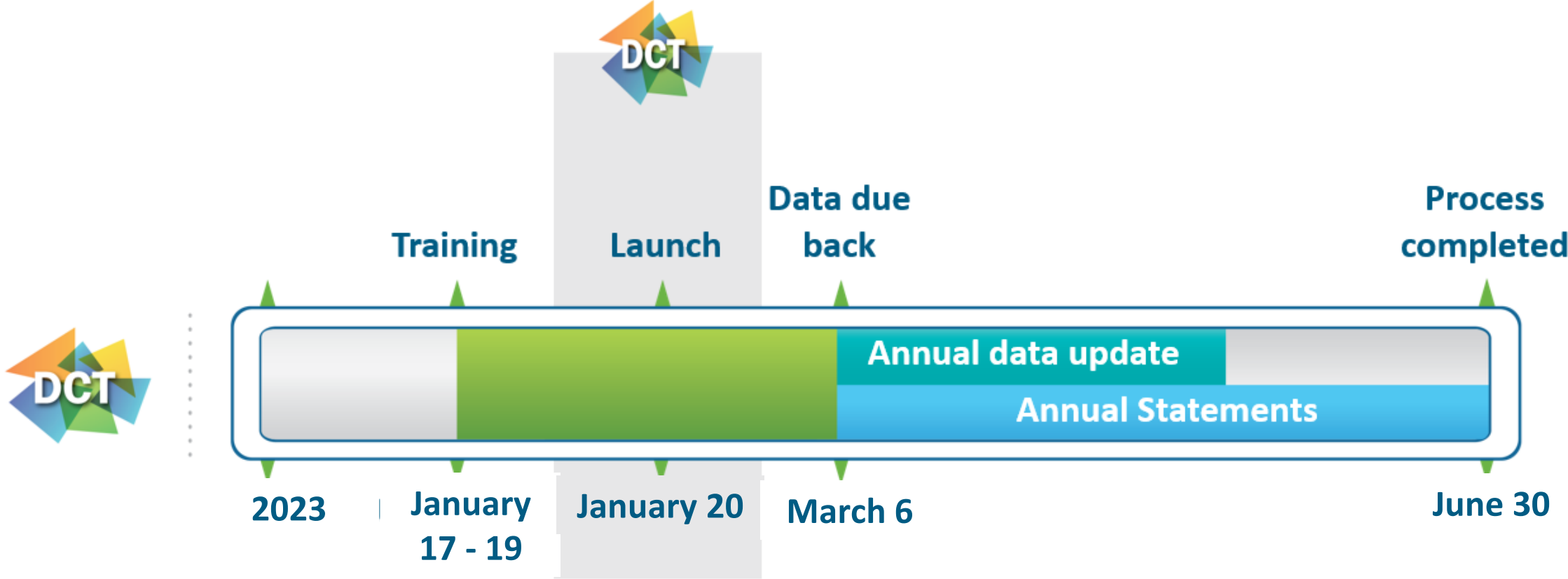


CAAT Employer Services: [employer@caatpension.ca](mailto:employer@caatpension.ca)

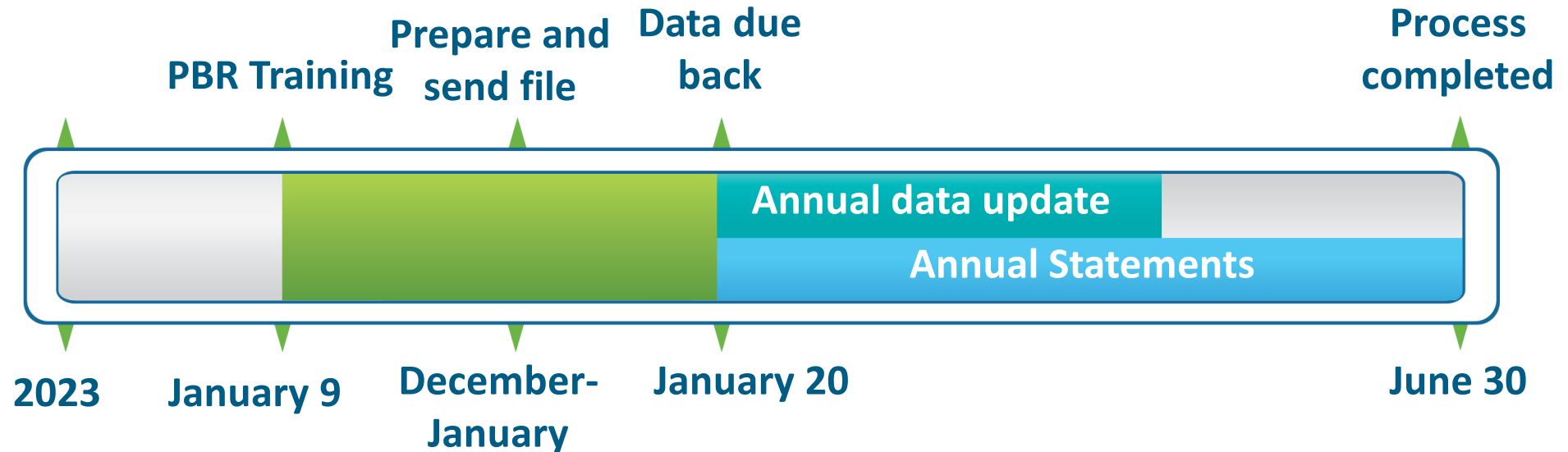


# Poll Question

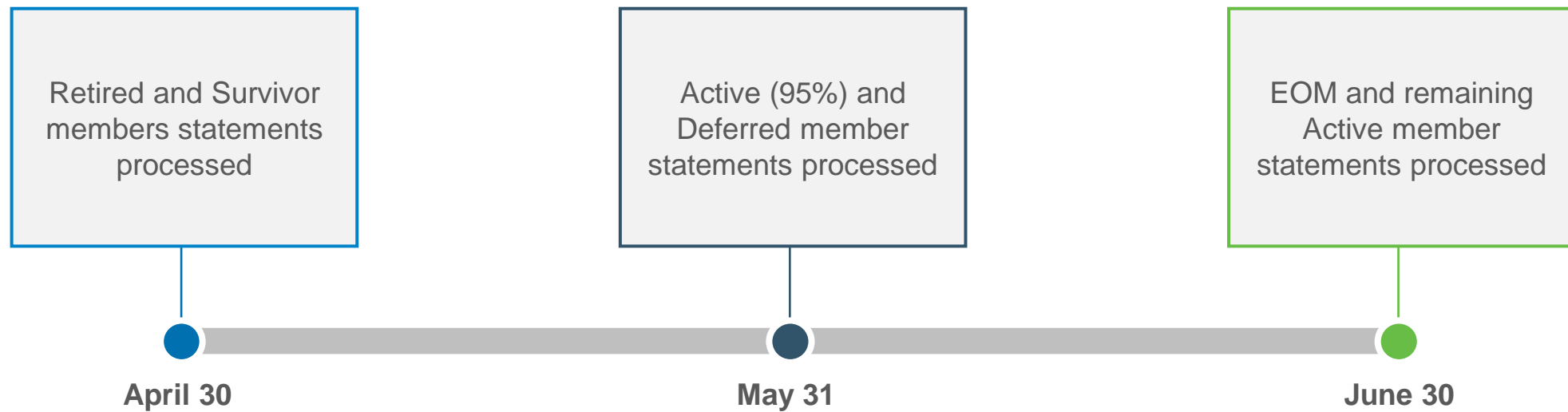
# 2022 Data Collection Tool (DCT) schedule – for employers with DBprime and DBplus only



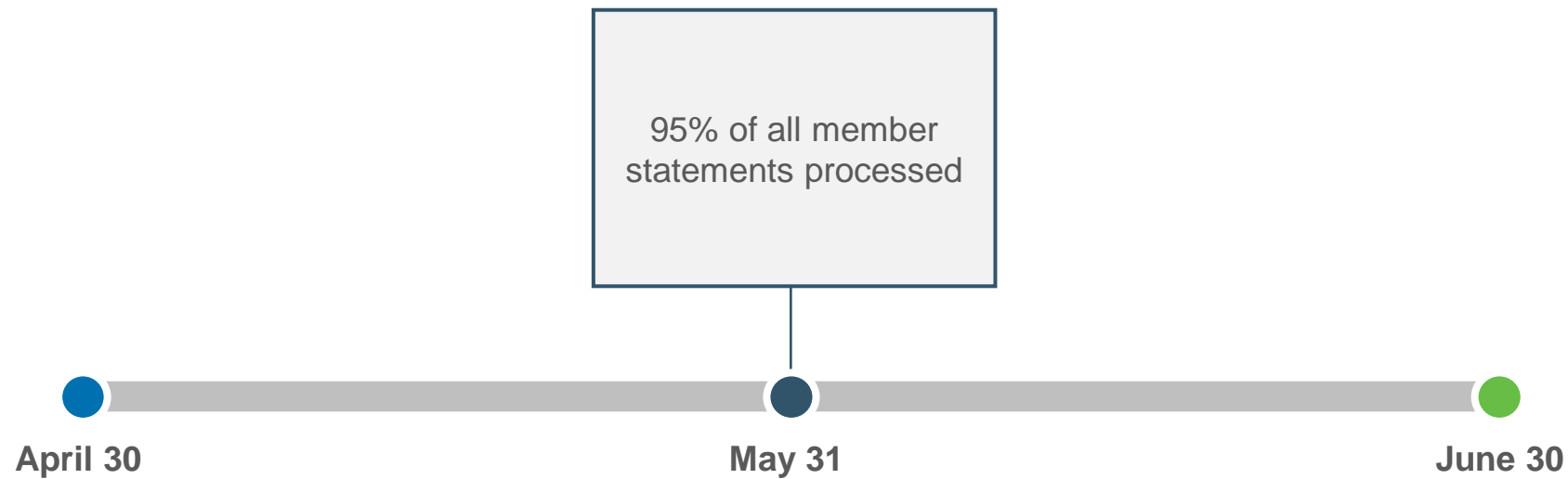
# Payroll based reporting (PBR) 2022 data collection schedule



# Annual Statement Timeline – Employers who work directly with CAAT



# Annual Statement Timeline – Employers who work with our Administration Partners



# Employer attestation

- Attestations were sent on Jan 16
  - 39% of the attestations returned
- Signed forms due March 31
  - Send forms to Sandy Cook:  
[scook@caatpension.ca](mailto:scook@caatpension.ca)
  - Any questions, contact Sandy:  
**647-837-6752**



# Member Learning Sessions

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



# All member webinars

Take a deep dive into all things pension



Visit the Member page of the website

<https://www.caatpension.ca/members/planning-your-retirement/member-presentation>



# Book a member webinar today

[presentations@caatpension.ca](mailto:presentations@caatpension.ca)



# Service standards – Q4 2022

Process	Volume	Target turnaround	Attainment	Average turnaround
Retirements	530	30 days	91%	15 days
New pension starts	379	2 days	99%	2 days
Deaths	173	30 days	99%	12 days
Service purchase quotes	147	30 days	99%	10 days
Pension estimates	326	10 days	96%	5 days
Terminations	413	30 days	93%	13 days
Enrolments	2,020	10 days	100%	1 day

# Q4 2022 Employer Services Service Standards

Process	Volume	Target Turnaround	Attainment
<b>Emails and PAL messages</b>	1,313	1 business day	93%
<b>Voicemails</b>	14	1 business day	100%

# Service standards – 2022

Process	Volume	Target turnaround	Attainment	Average turnaround
Retirements	1,682	30 days	94%	17 days
New pension starts	1,054	5 days	96%	2 days
Deaths	522	30 days	99%	12 days
Service purchase quotes	519	30 days	96%	12 days
Pension estimates	1,556	10 days	97%	4 days
Terminations	1,126	30 days	96%	14 days
Enrolments	7,462	10 days	100%	1 day

# 2022 Employer Services Service Standards

<b>Process</b>	<b>Volume</b>	<b>Target Turnaround</b>	<b>Attainment</b>
<b>Emails and PAL messages</b>	5,550	1 business day	90%
<b>Voicemails</b>	107	1 business day	96%

# Contributors podcast



The image shows a promotional graphic for a podcast episode. On the left, a blue vertical banner contains the 'Contributors' logo (a speech bubble with a waveform) and the names and titles of the two speakers: Dr. Susan Black, President & CEO of The Conference Board of Canada, and Derek Dobson, CEO & Plan Manager of CAAT Pension Plan. To the right of the banner are two headshots: a woman with short brown hair wearing a red and yellow scarf, and a man with short brown hair in a blue shirt and tie. Below the photos, a dark blue banner contains the episode title in white text. At the bottom, a grey banner contains the text 'Listen here' with a red underline.

**Contributors**  
Dr. Susan Black  
President & CEO, The Conference Board of Canada  
Derek Dobson  
CEO & Plan Manager, CAAT Pension Plan

**The Marathon for Talent:  
How to attract & retain talent  
through a long-term lens**

[Listen here](#)

## Special video episode

- The one big thing employees and candidates are looking for
- A winning formula to overcome talent & attraction challenges
- How to get an edge on your competitors

# Talent Recruitment Toolkit



[Access the toolkit](#)

- Amplify your recruitment strategy
- Download digital and print resources
- Add the badge to your materials
- Share the link with your candidates



# Questions



# Upcoming events

Employers who work directly with CAAT:

March 9 – Employer Education Session - Annual Statement Overview

April 13 - Employer Education Session – In-Year reporting of Retirements, Terminations and Death



# Poll Question

# Celebrating 2 years of My Pension



**21,885**

**19,312 (2021)**

Members registered



**37,344**

**26,342 (2021)**

Member transactions



**387,584**

**200,813 (2021)**

Self-serve estimates in My Pension

# Promoting My Pension

- Our target this year is to have **65%** of all our active members registered to My Pension
- Be our partner to spread the word!
- Online access = happy members

# Celebrating 2 years of PAL



**625**

**355 (2021)**

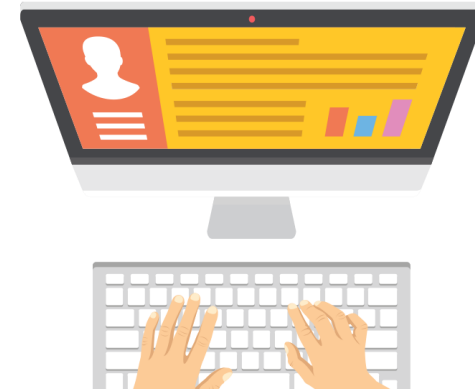
Registered users



**161**

**88 (2021)**

Employers making transaction in PAL



**19,100**

**6,010 (2021)**

Total employer transactions in PAL

# Future Portal Enhancements



Making  
administration  
easier



Reduce paper



Expanding online



Unified  
experience



Self-service



Personalized



Streamline  
workflow

# 2023 Planned Portal Enhancements

## My Pension (members)

- Complete retirement election online and provide any supporting documentation
- See status of retirement package with the Plan

## Pension Administration Link – PAL (employers)

- Enhanced Leave reporting
- Contribution Remittance forms
- See status of member's retirement package

# LTD member Pension Adjustments for 2022

Employers working directly with CAAT with DBprime:

- T4A with 2022 pension adjustments
  - Sent out on February 17
- Members can contact the Plan if they don't receive their T4A or have questions





# June 30 Retirements

- Send Pension Benefits Applications
  - Ensures members are set-up for pension on July 1
- Processed 219 June 30 retirements last year
- Book a Retirement Planning presentation for your members: [presentations@caatpension.ca](mailto:presentations@caatpension.ca)
- Please note that you can start submitting these via PAL starting in March





# Questions

