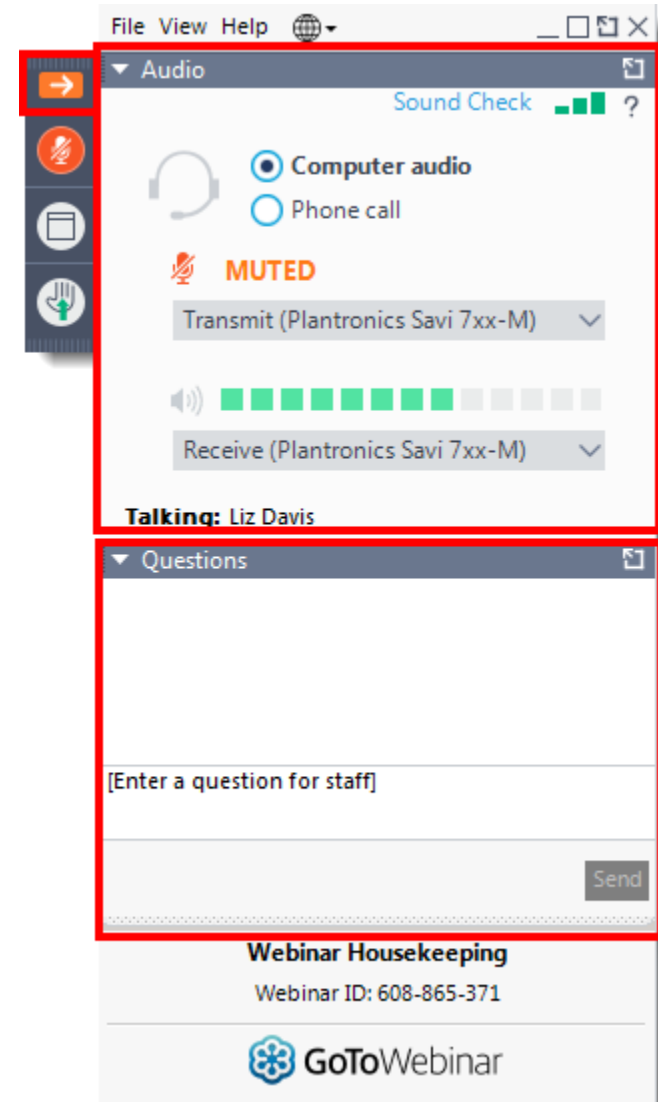


While we wait – audio instructions

- 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.





Employer update

February 22, 2022



Agenda

- Growth at the Plan
 - Employer News
 - Contribution Remittances
 - Annual Data Collection
 - Annual Statement timeline
 - Employer Attestation
 - Member presentations
 - Upcoming events
 - Service standards – all of 2021 and Q4 2021
- Celebrating 1 year of CAAT portals – My Pension and PAL
 - Portal roadmap for 2022
 - June 30 Retirements
 - LTD Pension Adjustments
 - Quarterly Reports
 - Non-member letters

Employer News Update

- Adjusting frequency of newsletters
- Next edition will be sent out in April
- After April we will send the Employer News in:
 - June
 - August
 - October
 - December



Contribution Remittances

- Please ensure that you are sending your contributions to us each month - 5th Ontario business day of each month
- Please reconcile your 2021 contributions with the Plan when you receive your final 2021 contribution reconciliation package from our Finance team
 - Do not send funds or take credits for 2021 contributions when remitting your 2022 contributions

Contribution Remittances

Form Name	Where to Send	How to Send
CAAT RPP & CAAT RCA Contribution Remittance Summary (34-A)	CAAT Finance CIBC Mellon	As an email attachment. Do not include any private member data such as SIN.
Purchased Pension Remittance (014-C)	CAAT Finance CIBC Mellon	As an email attachment. Do not include any private member data such as SIN.



CIBC Mellon: B1K@cibcmellon.com
CAAT Finance: finance@caatpension.ca

Poll Question

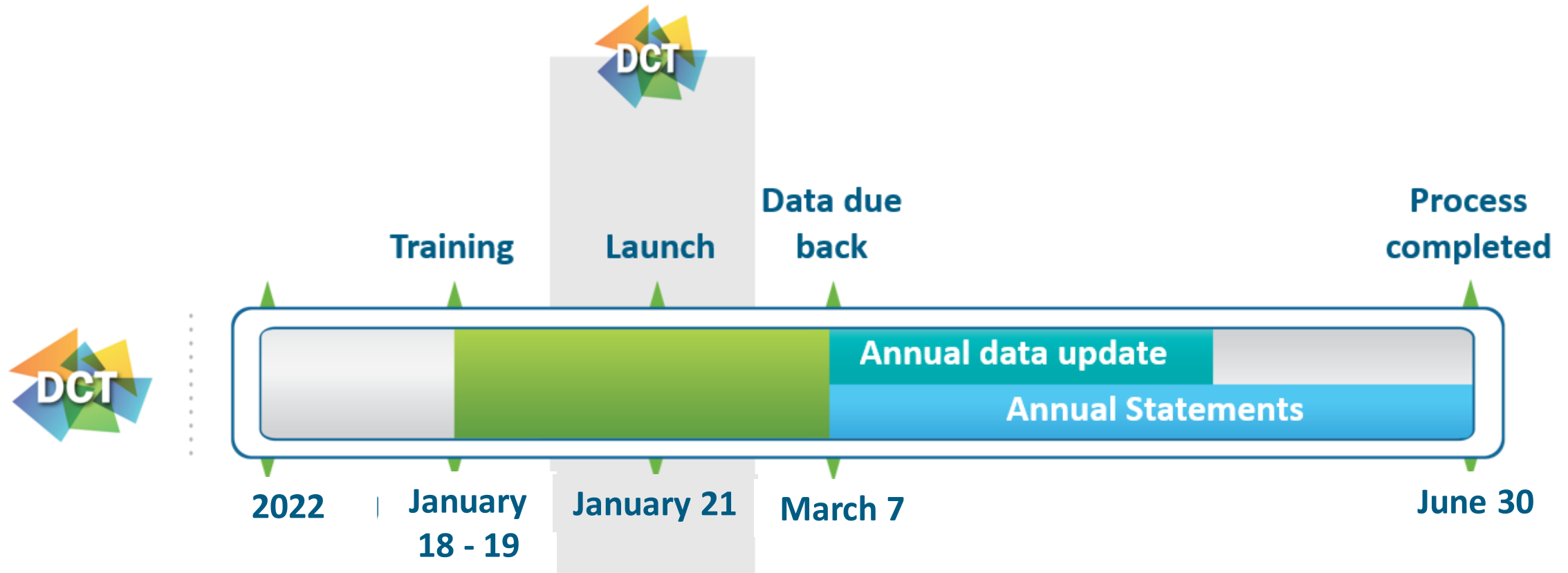
CAAT Plan is one of Canada's fastest growing plans

Growth in 2022

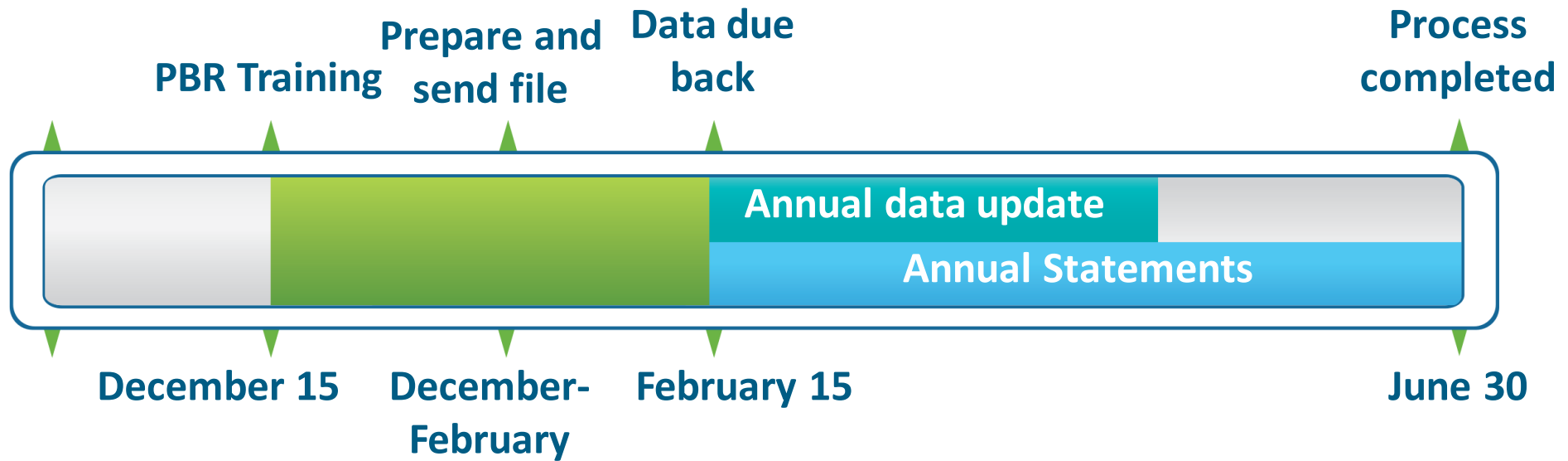
- 36 new employers
- 29 employers through affinity agreement with Canadian Bar Insurance Association
- 421 new members



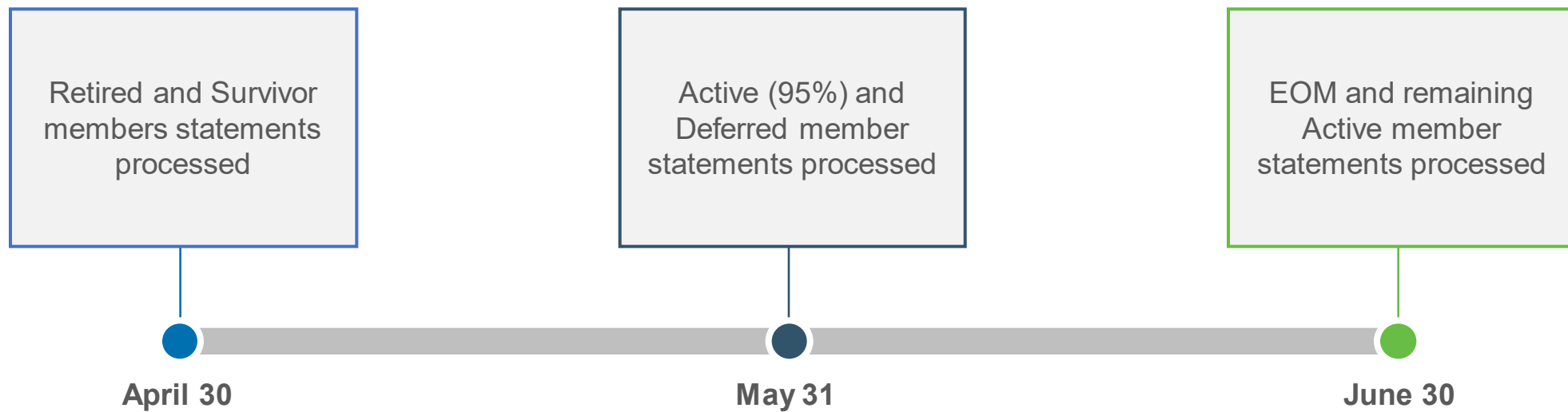
2022 Data Collection Tool (DCT) schedule – for employers with DBprime and DBplus only



Payroll based reporting (PBR) 2021 data collection schedule

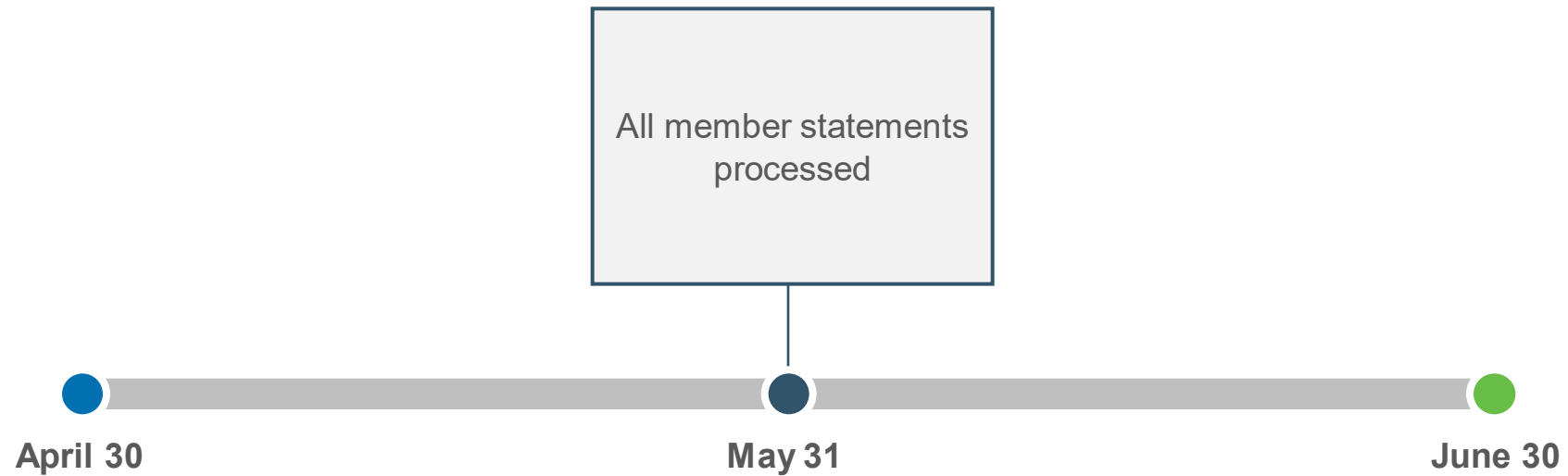


Annual Statement Timeline – Employers who work directly with CAAT



PDF copies of member statements will not be provided

Annual Statement Timeline – Employers who work with our Administration Partners



Employer attestation

- Attestations were sent on Jan 14
 - Half the attestations returned
- Signed forms due March 31
 - Send forms to Sandy Cook:
scook@caatpension.ca
 - Any questions, contact Sandy:
647-837-6752





Member presentations

- Booking for Spring
- Webinar topics
 - Plan overview
 - 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

Upcoming events

Employers who work directly with CAAT:

April 7 – Employer Education Session - Annual Statement Overview

All Employers:

April 19 – Employer Update webinar



Service standards – Q4 2021

Process	Volume	Target turnaround	Attainment	Average turnaround
Retirements	514	30 days	98%	11 days
New pension starts	423	2 days	98%	2 days
Deaths	120	30 days	100%	7 days
Service purchase quotes	242	30 days	100%	10 days
Pension estimates	2312	10 days	98%	5 days
Terminations	599	30 days	97%	16 days
Enrolments	1,454	10 days	99%	1 day

Service standards – 2021

Process	Volume	Target turnaround	Attainment	Average turnaround
Retirements	2,199	30 days	96%	14 days
New pension starts	1,735	5 days	97%	2 days
Deaths	517	30 days	99%	5 days
Service purchase quotes	1,359	30 days	100%	14 days
Pension estimates	1,551	10 days	93%	5 days
Terminations	1,848	30 days	95%	18 days
Enrolments	6,834	10 days	99%	1 day



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Welcome to the Contributors Podcast

A podcast about building Canada's future,
today. Subscribe, listen, contribute.



Poll Question

Celebrating 1 year of PAL



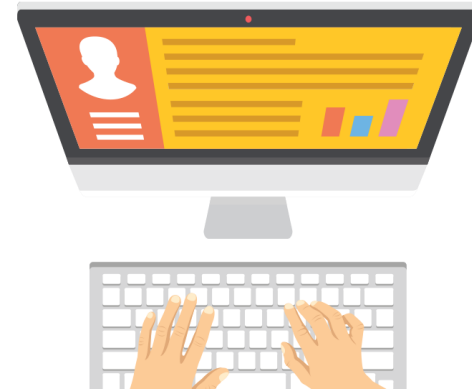
355

Registered users



88

Employers making transaction in PAL



6,010

Total employer transactions in PAL

Celebrating 1 year of My Pension



19,312

Members registered



26,342

Member transactions



200,813

Self-serve estimates in My Pension

2022 Roadmap for PAL and My Pension

Q1
2022

Q2
2022

Q3
2022

Q4
2022



My Pension

Access available, communication sent and registrations started:

- Survivors
- Retired Members

Access available and communication will be sent to members with annual statement:

- EOM Members
- Deferred Members

Annual Statements available for:

- EOM Members
- Deferred Members
- Survivors
- Retired Members

- Initial Purchase Quote
- Survivors
 - Payment History & Tax Changes
- Retired Members
 - Payment History & Tax Changes

- Review Case / Transaction Progress

PAL

- Employer provided with ability to add or remove their contacts

- ER Contribution Remittance
- Leave Reporting
- Initial Purchase Quote

- DCT Single Sign-On

LTD member Pension Adjustments for 2021

Employers working directly with CAAT with DBprime:

- T4A with 2021 pension adjustments
 - Sent out by February 28 for members on LTD
- Members can contact the Plan if they don't receive their T4A or have questions



June 30 Retirements

- Send Pension Benefits Applications ASAP
 - Ensures members are set-up for pension on July 1
- Processed 198 June 30 retirements last year
- Book a Retirement Planning presentation for your members: presentations@caatpension.ca
- Please note that you can start submitting these via PAL starting in March



Quarterly Reports

- The employer reports that provide listings of EOM, Deferred and part-time members will no longer be provided by CAAT starting in Q1 2022
- LTD member listing will still be provided in July to review
- Please contact your Employer PA to confirm membership status with the Plan

Non-Member letters – college sector employers only

- Non-member letters updated to include the intent to enrol link
- Employees can initiate enrolment electronically
- You will still need to review and send these enrolments in PAL and can reject if the employee is not eligible to join the Plan



