

PENSION BULLETIN 2017-01

To: Pension Plan Administrators

Re: New online application and filing system for processes under the *Pension Benefits Act*

FCNB's new online portal for applications and filings under the *Pension Benefits Act* is now live. As part of the move to the new online system, all pension plan administrators are required to set up an account at <https://portal.fcnb.ca>.

Please follow the following steps to set up an account:

- The portal uses an email address as the user account. Please send an email to support@fcnb.ca specifying:
 - The full name of the pension plan administrator and the name of the person who will access the portal on behalf of the pension plan administrator.
 - The email address to be used as the user account to access the portal by this person.
 - The names of the pension plan(s) which should be connected to the user account.
- Our support staff will then set up the account and generate an invitation code which will be sent to the email address specified as the user account.
- The pension plan administrator portal user should then complete the account creation process by clicking the invitation code link and following the instructions on the portal.

Pension plan administrators can also authorize delegates (actuaries, lawyers, insurance companies, etc.) to perform applications and filings on their behalf with respect to a particular pension plan. Please be advised that delegates will be able to view all of the information on file about the pension plan once they have been authorized as a delegate and have set up their own account.

Instructions for using the portal and completing the various online processes are available on our portal FAQ at <http://fcnb.ca/pensions-portal-faq.html>

Once a pension plan administrator has set up an account, please login and view the pension plan details for each of your registered pension plans to verify that the information that we

have on file for your pension plan(s) is correct. Although a quality assurance process was followed in migrating data from our old system to the new system, some of the information on file may be incomplete or out of date.

FCNB will continue to accept paper filings until further notice. If you have been notified of any deficiencies in any paper applications or paper filings that you have already submitted, you must address those deficiencies no later than 30 June 2017.

If you have any questions, please email info@fcnb.ca and provide your name, phone number and your question.