Simplify Your Business with PIP Self-Directed

Starting January 1, 2010, you can begin moving clients into a PIP Self-Directed.

Your business is hectic, even at the best of times. So it's always great to hear about ways to simplify it. As a premier dealer firm, we are committed to helping you build your business and foster strong relationships with your clients.

Move your clients into a PIP Self-Directed

A PIP Self-Directed helps you save valuable time, with less administrative work, and provide better service to your clients plus:

- You'll deal with PIP back-office support that you know and trust
- You'll get quality customer service and know that you are dealing with people who are committed to your success
- Available in RRSP, RRIF and all available locked-in products

Benefits to you

- Greater control over your client's entire account
- Simplicity, efficiency and ease of use for your administration team – PIP operating program so there's no need to learn a third party system
- No need to contact multiple fund companies – simply make one call to PIP Advisor Services

Improved processes with clients

- Consolidated statements – less waste, less reports mailed to your client
- Direct transactions between dealer and client bank accounts
- Less manual cheques and more automated transactions
- Quarterly statements

For clients opening a PIP Self-Directed we've waived the trustee fee for the first year.

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Key benefits of PIP Self-Directed

There are many key benefits to moving your client to a PIP Self-Directed:

- Consolidated reporting
- PAC/SWP set-up
- One back-office system
- Online access to account information
- Same day transactions
- Ease of withdrawals
- Less paperwork
- Single point of contact
- Hold GICs

Consolidated reporting

Clients only receive a single consolidated statement. Their PIP statement reflects all their holdings. Clients also receive consolidated tax reporting, including tax receipts.

PAC/SWP set-up

Going to a PIP Self-Directed also makes it easier for you to set-up PAC and/or SWP plans. Because your client's account information is consolidated on one system, you won't need to review and monitor multiple platforms. All this information is consolidated for you on the PIP system.

Ease of withdrawals

When a client needs money from their account, with a PIP Self-Directed, you'll be able to process the request immediately (also applies to trades), though as always, evidence of client instructions must be maintained.

Less paperwork

Using a PIP Self-Directed cuts down on your paperwork. You won't be required to fax supporting trade documentation for redemptions to the fund company or head office. This means less chance of missed trade dates or lost documentation. As well:

- All forms standardized
- All forms available online and pre-populated (where applicable)
- Reduced paper retention – other company's forms don't need to be held on-site

Single point of contact

You'll no longer have to follow-up with numerous fund companies. You simply deal with PIP Advisor Services for all your follow-up needs.

To learn more about moving your clients into a PIP Self-Directed contact Partners In Planning Advisor Services at 1.877.967.4357 or email us at AdvisorServices@PartnersInPlanning.com

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