

PIP Self-Directed – The Smart Way to Manage Your Account

We're pleased to introduce PIP Self-Directed, the smart and simplified way to manage your account.

Advantages of a PIP Self-Directed

There are two types of investment accounts, client name and self-directed.

With a client name account, your PIP Advisor helps you open mutual fund accounts directly with fund companies. They fill out forms, collect your signature for each account and send off the paperwork. Then at statement time you get statements from each of your accounts.

With a PIP Self-Directed, you open an account with your PIP Advisor and that's it. No need to fill out and sign multiple forms or documents.

Your PIP Advisor can then trade, rebalance and manage all your assets for you and you get a single, consolidated statement (quarterly) that reflects changes across all holdings, no matter which fund company's products you own.

PIP Self-Directed is available in RRSP, RRIF and all available locked-in products.

Benefits of PIP Self-Directed

- Single consolidated quarterly statements – All your mutual fund investments and transactions from any number of fund companies are presented on a single consolidated statement.
- Simplified bank withdrawal – If you invest through regular pre-authorized contributions, a single withdrawal from your bank account can cover the purchase of all your funds from multiple fund companies.
- One bank deposit – If you need cash and have to sell some of your fund units, you can spread the sale out amongst a number of fund companies that you own and receive a single bank deposit for the entire amount.
- One point of contact – Your Partners In Planning Advisor is your single point of contact for inquiries about your mutual fund investments as well as your overall plan.
- Account information – You get 24/7 Internet access to your account information through our safe and secure system.

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

Manage your account the smart way. To learn more about the benefits of PIP Self-Directed, contact your PIP Advisor today.

