

Ask CWT!

Questions about any of the services we offer? Need to know more about a product?

Call us at 1 (888) 877-7748 or email cwt.marketing@cwt.ca.

Sales Directors

B.C. Region

Jacqueline Poissant

600 - 750 Cambie Street
Vancouver, BC, V6B 0A2
Direct: (604) 699-4855
Toll Free: 1 (800) 663-1124
jacqueline.poissant@cwt.ca

Alberta Region

Thaidra Walsh

200 - 606 4th St SW
Calgary, AB, T2P 1T1
Direct: (403) 291-5268
Toll Free: 1 (888) 894-2331
thaidra.walsh@cwt.ca

Prairie & Central Region

Joe Woitas

230 Portage Ave
Winnipeg, MB, R3C 0B1
Direct: (204) 947-5590
Toll Free: 1 (866) 947-5590
joseph.woitas@cwt.ca

Administration Corner

CWT is pleased to announce a new Payment Option Request & RRIF Mutual Fund Systematic Withdrawal Plan ([SWP](#)) process. RRIF clients can now allocate percentages to the mutual funds they wish to redeem to make up their selected RRIF payment. To download the form, [click here](#).

Are you in transition?

Our **Advisor in Transition** Program assists with transfer fees when you transfer accounts to CWT. Contact your regional Sales Director, or call our Client Services Team at 1 (800) 663-1124 for more information.

CURRENTS

Western Canada's Monthly Economic Bulletin

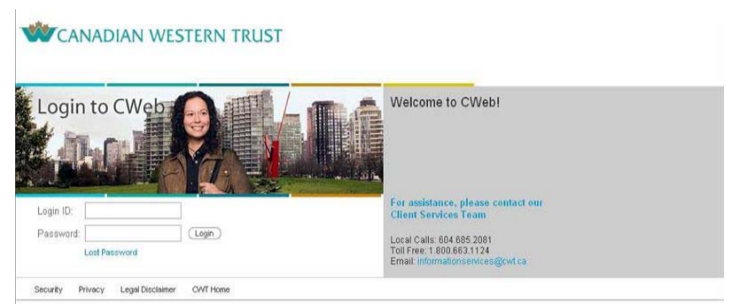
A CanadaWest Foundation publication, CURRENTS is a monthly bulletin on Western Canada's economic and public policy issues.

The three latest issues of CURRENTS are available below. Click [here](#) for other publications and articles by the CanadaWest Foundation.

[CURRENTS - March 2008](#)
[CURRENTS - February 2008](#)
[CURRENTS - January 2008](#)

The new face of CWeb

Canadian Western Trust is extremely excited to announce the release of our latest version of CWeb!



Our advisor community provided valuable feedback and we have included many new features to help you manage clients' accounts. The redesigned website will reflect changes that make navigation easier and CWeb even more user friendly.

Highlights of this release include:

- Single login for multiple dealer codes.
- Audio-visual tutorial and page-by-page 'Help'.
- Enhanced security.
- Interim statements and portfolio positions.
- Consolidated reports.
- Ability to export data.
- Intra-day and pending transactions.

To sign up for this enhanced version of CWeb, call us at 1 (800) 663-1124. or email informationservices@cwt.ca.

Stay tuned for additional developments coming soon!

Fee For Service

Canadian Western Trust's [Fee For Service](#) platform has been hailed as an innovative product for advisors looking for a new way to generate income for their business.

This platform provides you with the opportunity to work with your clients on an individual basis allowing you to customize fees and offer flexible payment options.

Marc Lamontagne, author of ["To Fee or Not To Fee"](#) has been an advocate of the fee-based model of compensation since 1996, when it was introduced to his financial planning firm Ryan Lamontagne Inc.

"The best candidates for a transition to the fee model are those advisors who are constantly looking for ways to improve their practice. These advisors are going to be those most receptive to change and the most willing to shift their behaviors in order to grow their practice. These advisors realize that to maximize the potential of their practices, they must constantly evolve the way in which they do business," says Marc.

For more information on how Fee For Service can work for you, call your regional Sales Director, or our Client Services Team at 1 (800) 663-1124.

Thinking of investing in mortgages?

Canadian Western Trust has made significant changes to its [Mortgage Investments Products and Services](#).

Enhancements to the process and product line include:

- Competitive fees; one of the lowest in the industry!
- Turnaround time as quick as 7 business days for Payouts and Discharges.
- Property appraisals accepted up to 12 months.
- Introduction of the **Non-Arms Length / Personal Mortgage** Investment Option.

LIMITED TIME OFFER!

Canadian Western Trust will waive the \$50 set up fee for all new Arm's Length Mortgages until September 2008. Call 1 (800) 663-1124 for more information.

Big News from the 2008 Budget Tax-Free Savings Account ("TFSA") and more...

Ever wondered how the new TFSA fits into the big picture?

[Click here](#) to read an article written by CWT's Richard Tebb reviewing the new TFSA and other important news from the 2008 budget.

THANK YOU for dealing with CWT, we appreciate being your "trust company of choice." We hope this newsletter offers value to your business and we appreciate any feedback.