



Employer Update

February 25, 2025



Agenda

- Plan growth update
- GROWTHplus Investment Account
- 2025 data collection schedules
- Annual pension statement process
- Member learning sessions
- Member portal security
- Upcoming events
- Pension adjustments for members on LTD/WSIB leave
- June 30th retirements



Plan growth update

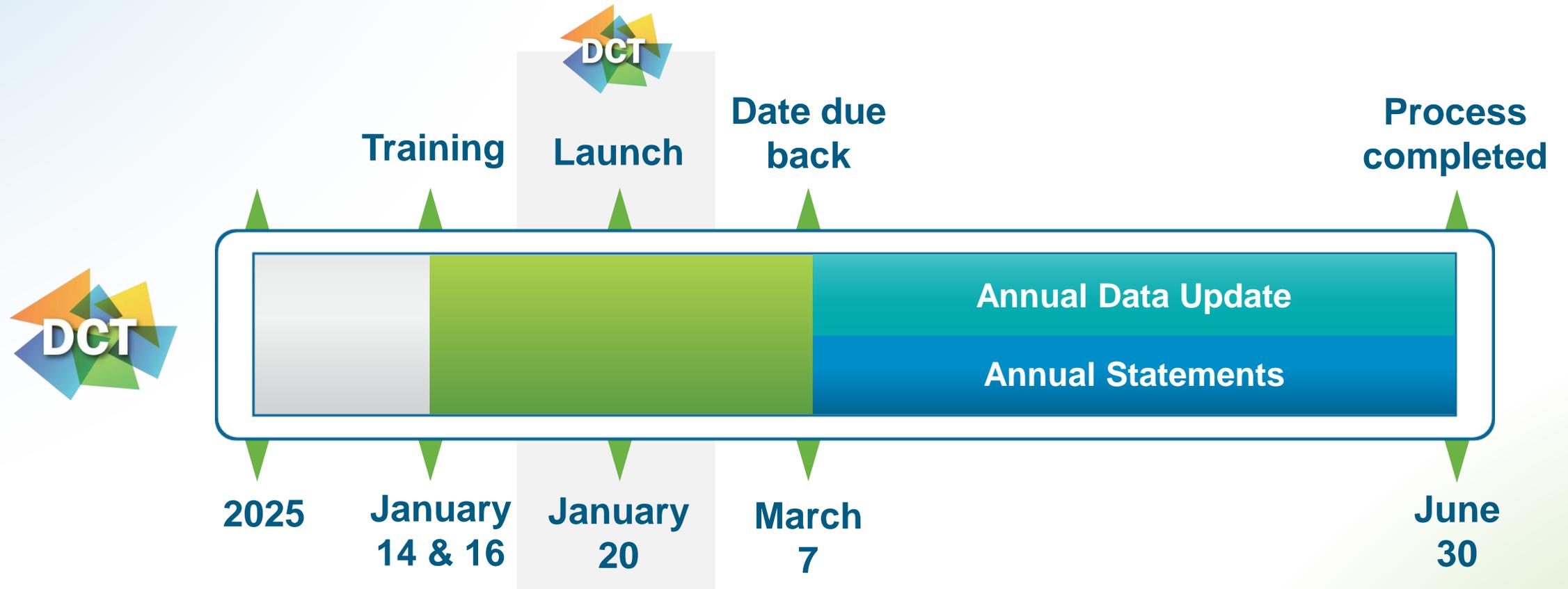
- Welcoming many new employers in 2024:
 - From 363 to 714 participating employers in one year
- Close to 2,000 new DBprime members and more than 17,000 new DBplus members



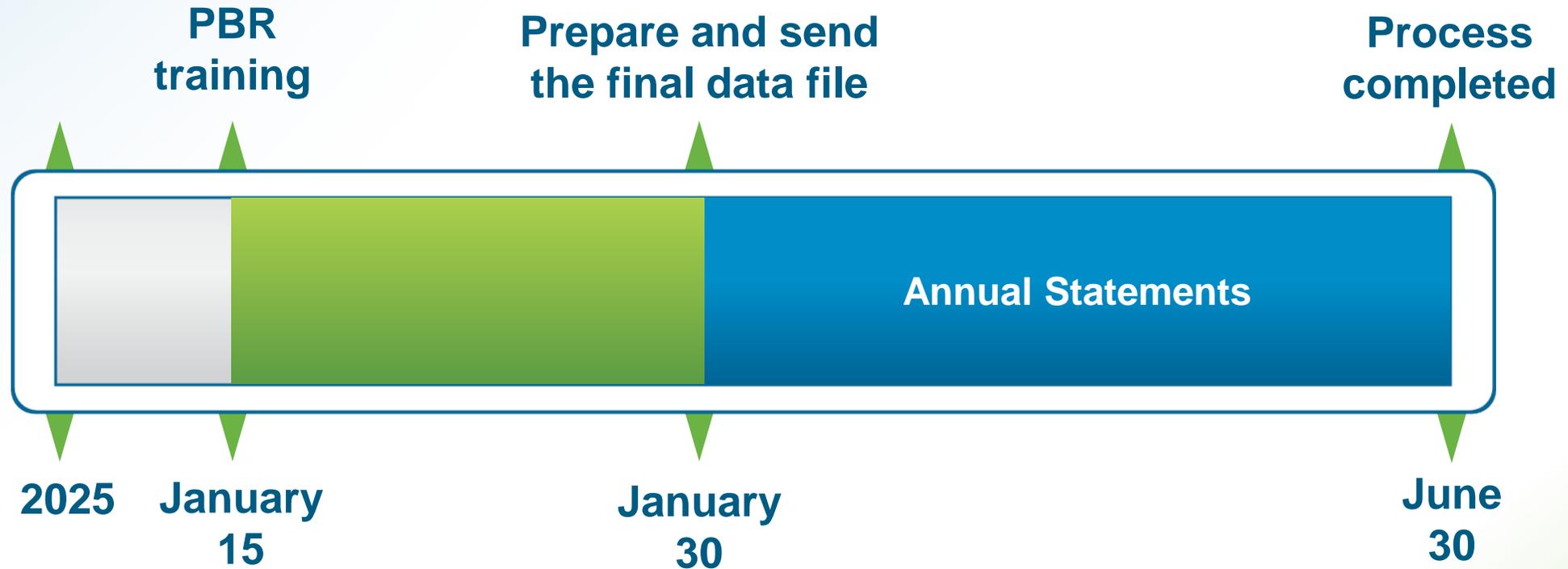


- CAAT's **GROWTHplus Investment Account** launched in 2024
- Opportunity for members of the Plan to contribute more towards retirement
- Response has been enthusiastic
- Participating employers do not match contributions or have administration responsibilities

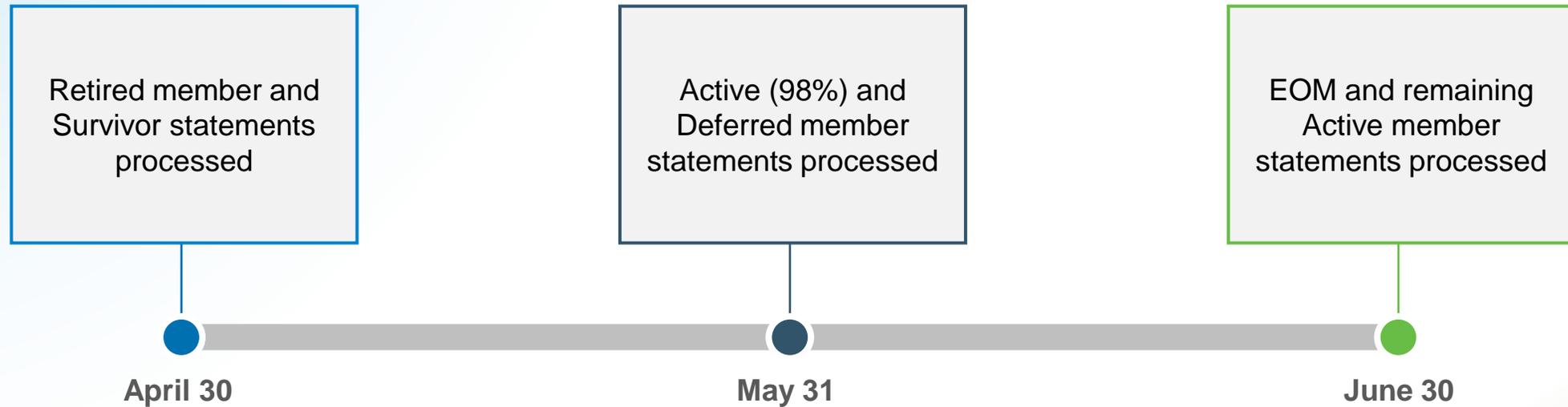
2024 Data Collection Tool (DCT) schedule



Payroll-based reporting (PBR) data collection schedule

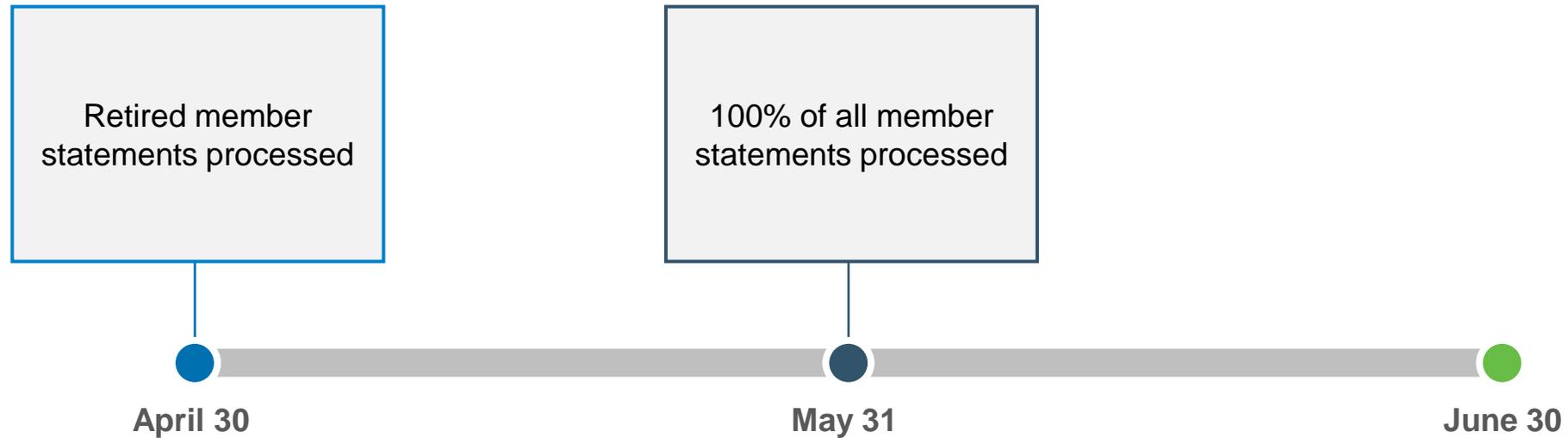


Annual pension statement timeline: Employers who work directly with CAAT



A complex process needing strong collaboration between employers and CAAT

Annual pension statement timeline: Employers who work with our Administration Partners



Member learning sessions

- 2025 schedule filling up fast!
- Webinar topics
 - A future you can count on:
Your CAAT Pension
 - Planning for retirement
 - Pension purchases
 - DBprime service purchases
 - DBplus pension purchases

Sessions include live demos of CAAT tools



How to book a member webinar

presentations@caatpension.ca

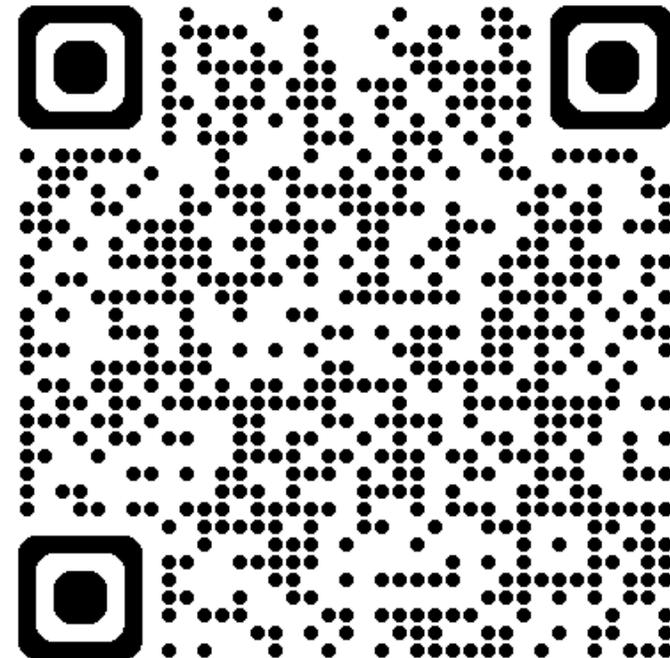


You can also follow us on Instagram!



Employer resources page

- Downloadable resources you can share with your employees
- Templates and key messages to support your recruitment, retention and total rewards strategies
- **NEW:** Remote learning for your members



Scan the QR code or visit caatpension.ca/employers/resources

Member portal security



- Enhancing the security of **My Pension** member portal by adding multi-factor authentication (MFA)
- Advanced notice and instructions available for members

Upcoming events

- Employer education sessions
 - March 6 – Annual Statement Overview
 - April 3 – In-year reporting – Terminations, retirements and pre-retirement deaths
- Employer Update webinar
 - June 24



For employers who work
directly with CAAT

LTD/WSIB 2024 pension adjustments

Employers working directly with CAAT with DBprime:

- T4A slips with 2024 pension adjustments
 - Will be sent out on February 28
- Members can contact the Plan if they don't receive their T4A or have questions



June 30 retirements

- Send Pension Benefit Applications
 - Ensures members are set up to receive first pension payment on July 1
- Processed close to 400 June 30th retirements last year
- Book a Retirement Planning presentation for your members: presentations@caatpension.ca
- Please note that you can start submitting applications via PAL starting in March



