The new FCNB portal

Bringing pension regulatory processes online

Jake van der Laan, CIO

FINANCIAL AND CONSUMER SERVICES COMMISSION
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COMMISSION DES SERVICES FINANCIERS ET DES SERVICES AUX CONSOMMATEURS
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At the end of this webinar, you should:

- have a good sense of how our new portal works
- understand the new functionality to be added soon relating to processes under the Pension Benefits Act
- know about resources available to assist you as you start using the portal

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https://portal.fcnb.ca

- New pension plan registrations, amendments, windups, transfers
- AIR, AVR and all other filings
- Standard contract registrations and LIF-RRIF transfers
- Coming this fall!

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Before you connect to the portal

- Pick an email address which you check regularly
- Consult our resources:
  - Regulatory "Before You Begin" guides
  - Portal Basics guide
  - Specific process guides
  - All available at http://fcnb.ca/portalfaq.html

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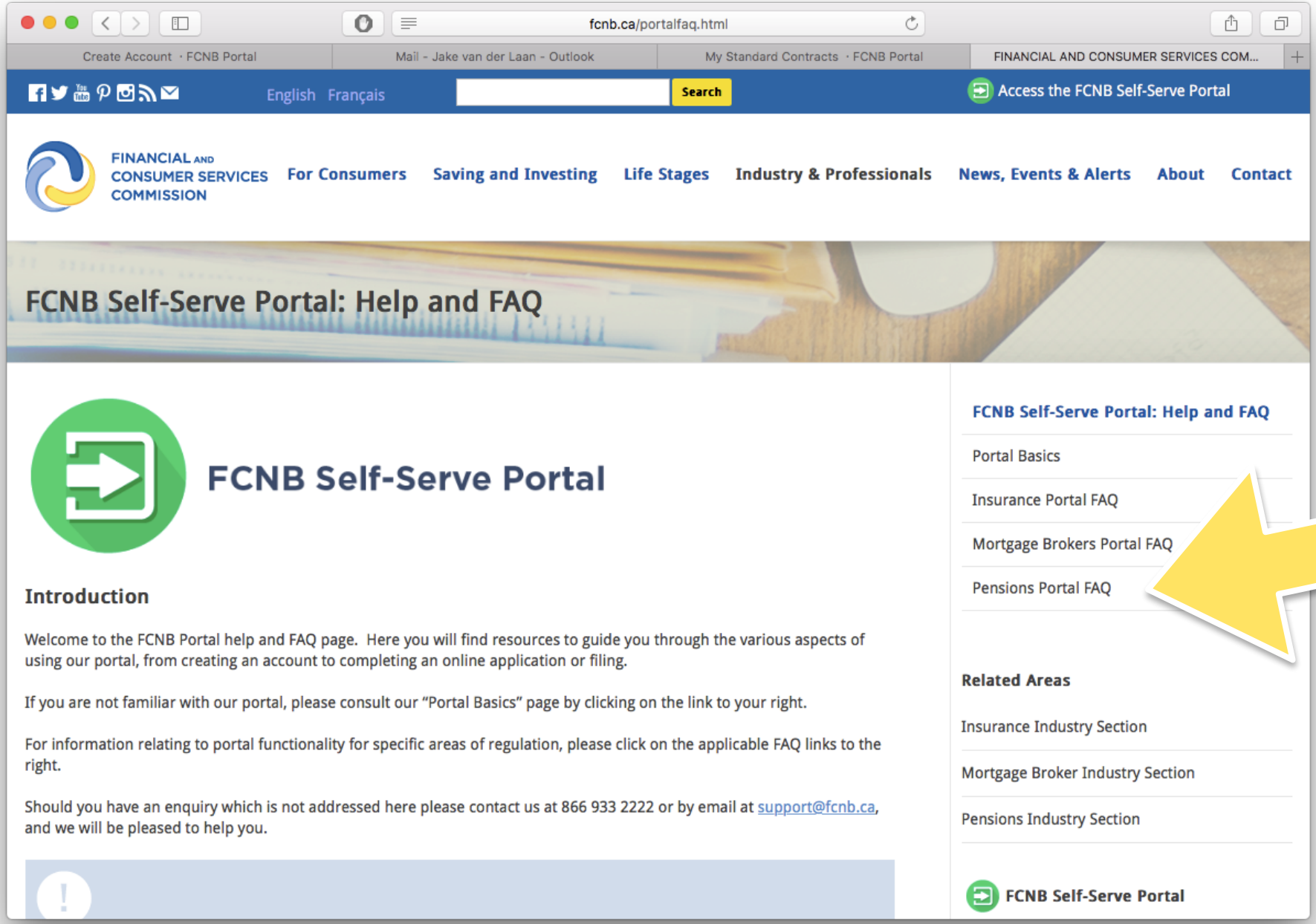
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FCNB Self-Serve Portal: Help and FAQ
FCNB Self-Serve Portal
Introduction
Welcome to the FCNB Portal help and FAQ page. Here you will find resources to guide you through the various aspects of using our portal, from creating an account to completing an online application or filing.
If you are not familiar with our portal, please consult our "Portal Basics" page by clicking on the link to your right.
For information relating to portal functionality for specific areas of regulation, please click on the applicable FAQ links to the right.
Should you have an enquiry which is not addressed here please contact us at 866 933 2222 or by email at support@fcnb.ca, and we will be pleased to help you.
FCNB Self-Serve Portal: Help and FAQ
Portal Basics
Insurance Portal FAQ
Mortgage Brokers Portal FAQ
Pensions Portal FAQ
Related Areas
Insurance Industry Section
Mortgage Broker Industry Section
Pensions Industry Section
FCNB Self-Serve Portal

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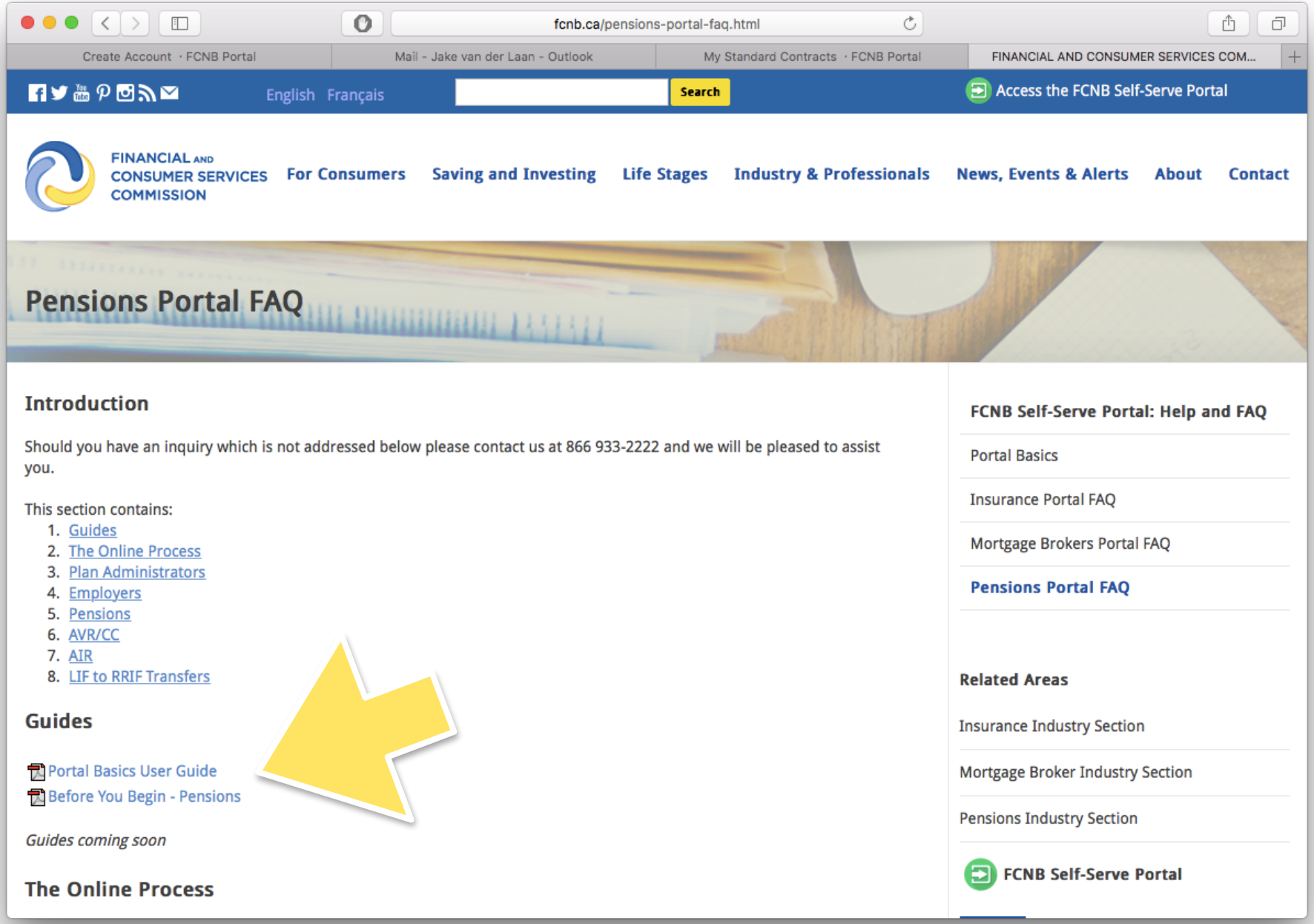
fcnb.ca/pensions-portal-faq.html
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Pensions Portal FAQ
Introduction
Should you have an inquiry which is not addressed below please contact us at 866 933-2222 and we will be pleased to assist you.
This section contains:
1. Guides
2. The Online Process
3. Plan Administrators
4. Employers
5. Pensions
6. AVR/CC
7. AIR
8. LIF to RRIF Transfers
Guides
Portal Basics User Guide
Before You Begin - Pensions
Guides coming soon
The Online Process
FCNB Self-Serve Portal: Help and FAQ
Portal Basics
Insurance Portal FAQ
Mortgage Brokers Portal FAQ
Pensions Portal FAQ
Related Areas
Insurance Industry Section
Mortgage Broker Industry Section
Pensions Industry Section
FCNB Self-Serve Portal

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General portal features

- Dynamic home page based on your type of account
- Auto save of processes after every step
- Yellow help text on almost every page
- Consistent functionality throughout
- Email messaging and reminders
- Support: support@fcnb.ca

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Creating an account

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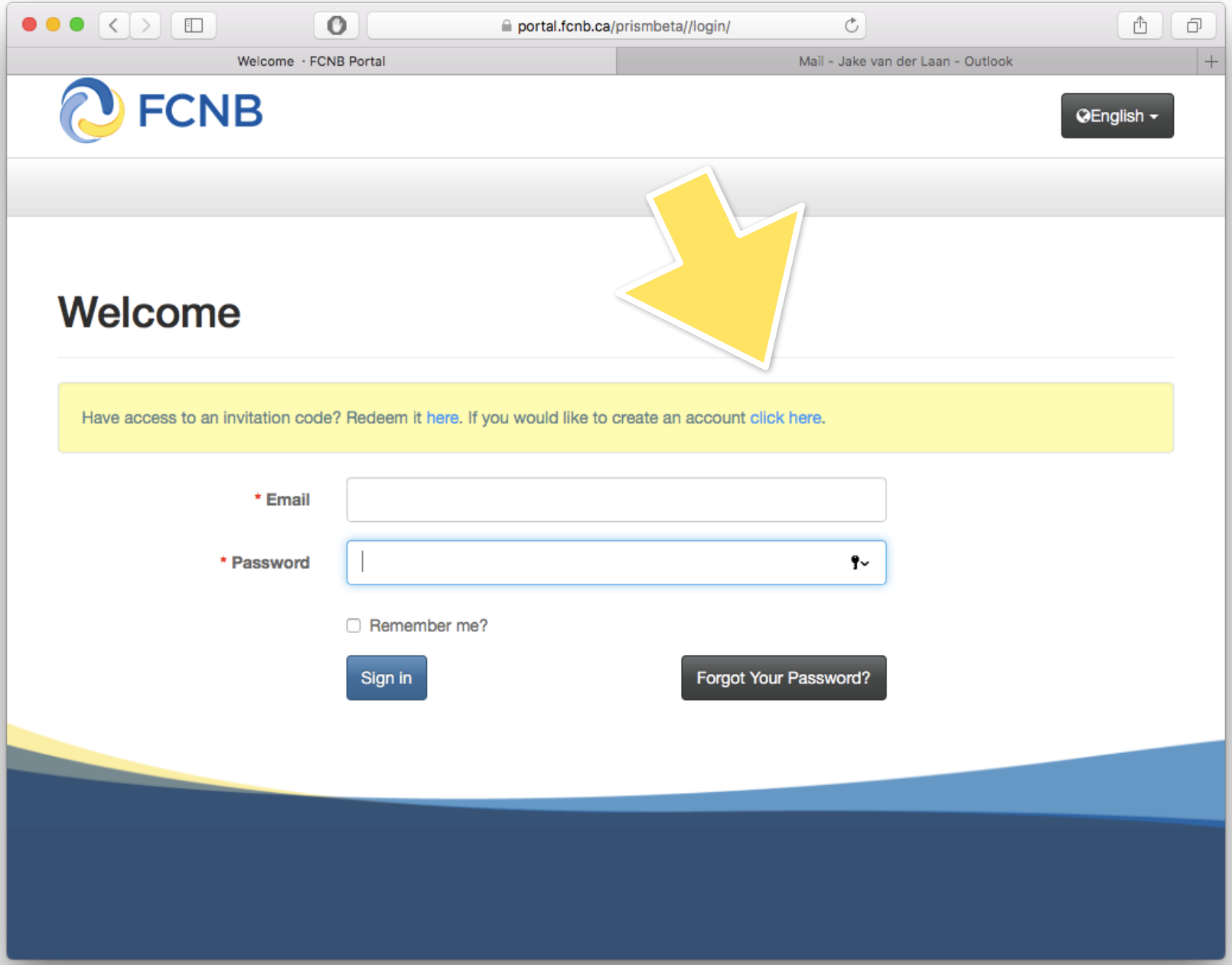
portal.fcnb.ca/prismbeta//login/
Welcome · FCNB Portal
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English
Welcome
Have access to an invitation code? Redeem it here. If you would like to create an account click here.
* Email
* Password
Remember me?
Sign in
Forgot Your Password?

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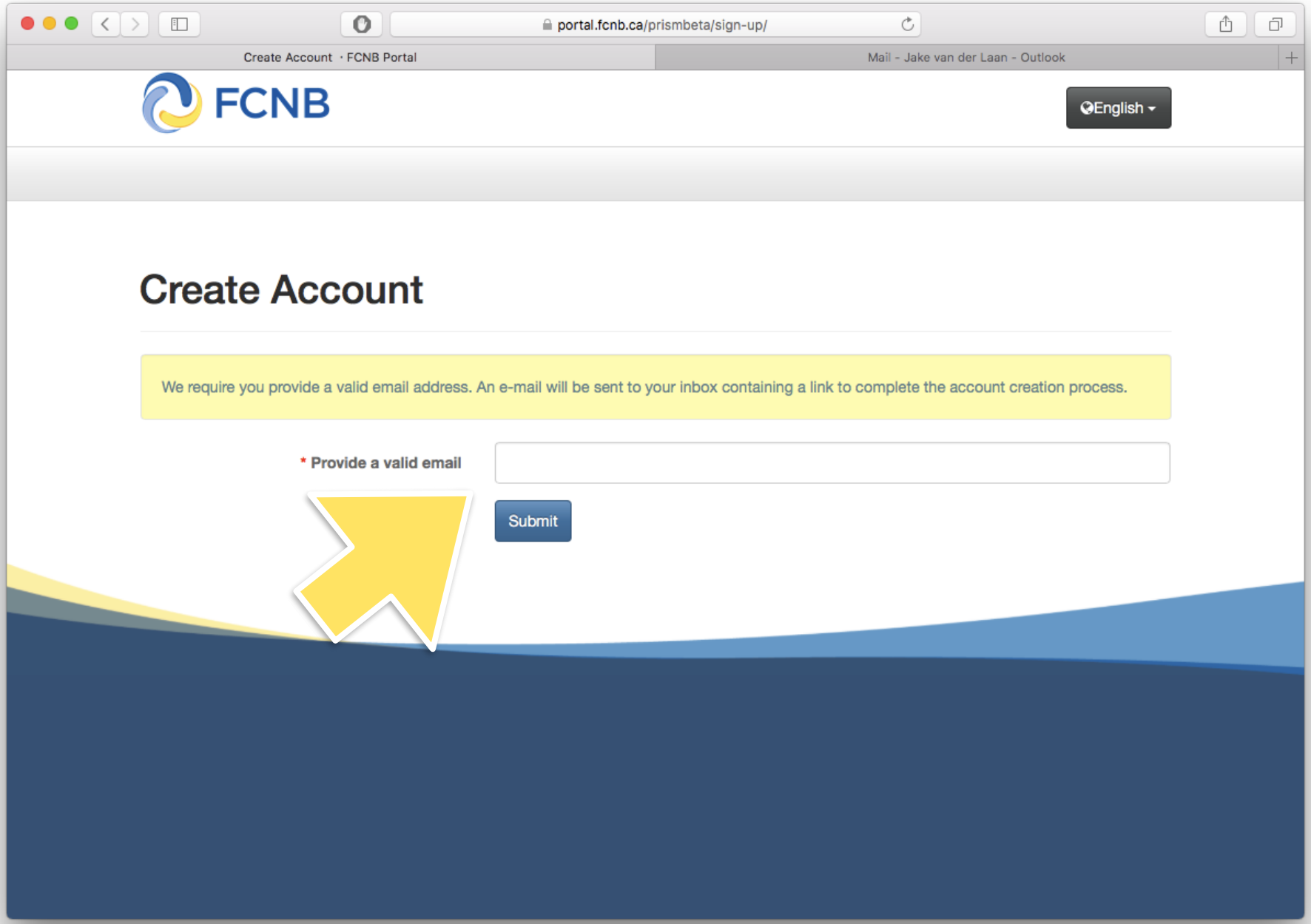
portal.fcnb.ca/prismbeta/sign-up/
Create Account · FCNB Portal
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Create Account
We require you provide a valid email address. An e-mail will be sent to your inbox containing a link to complete the account creation process.
* Provide a valid email
Submit

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outlook.live.com/owa/?path=/mail/inbox/rp

Create Account · FCNB Portal | Mail - Jake van der Laan - Outlook

Outlook Mail

Search Mail and People

New | Delete | Archive | Junk | Sweep | Move to | ••• | Undo

Folders

- Inbox
- Junk Email
- Drafts
- Sent Items
- Deleted Items 15
- Archive
- Scheduled

FCNB Portal Invitation \ Invitation au portail de la FCNB

FM

FCNB Portal Messaging
Today, 10:19 AM
jake.vanderlaan@outlook.com

Reply

Invitation code: 8F331182CC3F4DF7B6965EE43ED9C511

Click the link below to be directed back to the FCNB Portal to complete the account creation process.

Complete Registration<https://portal.fcnb.ca/prismbeta/register?invitation=8F331182CC3F4DF7B6965EE43ED9C511>

Code d'invitation : 8F331182CC3F4DF7B6965EE43ED9C511

Cliquez sur le lien ci-dessous pour retourner au portail de la FCNB et poursuivre la création de votre compte.

Terminer le processus d'inscription<https://portal.fcnb.ca/prismbeta/fr/register?invitation=8F331182CC3F4DF7B6965EE43ED9C511>

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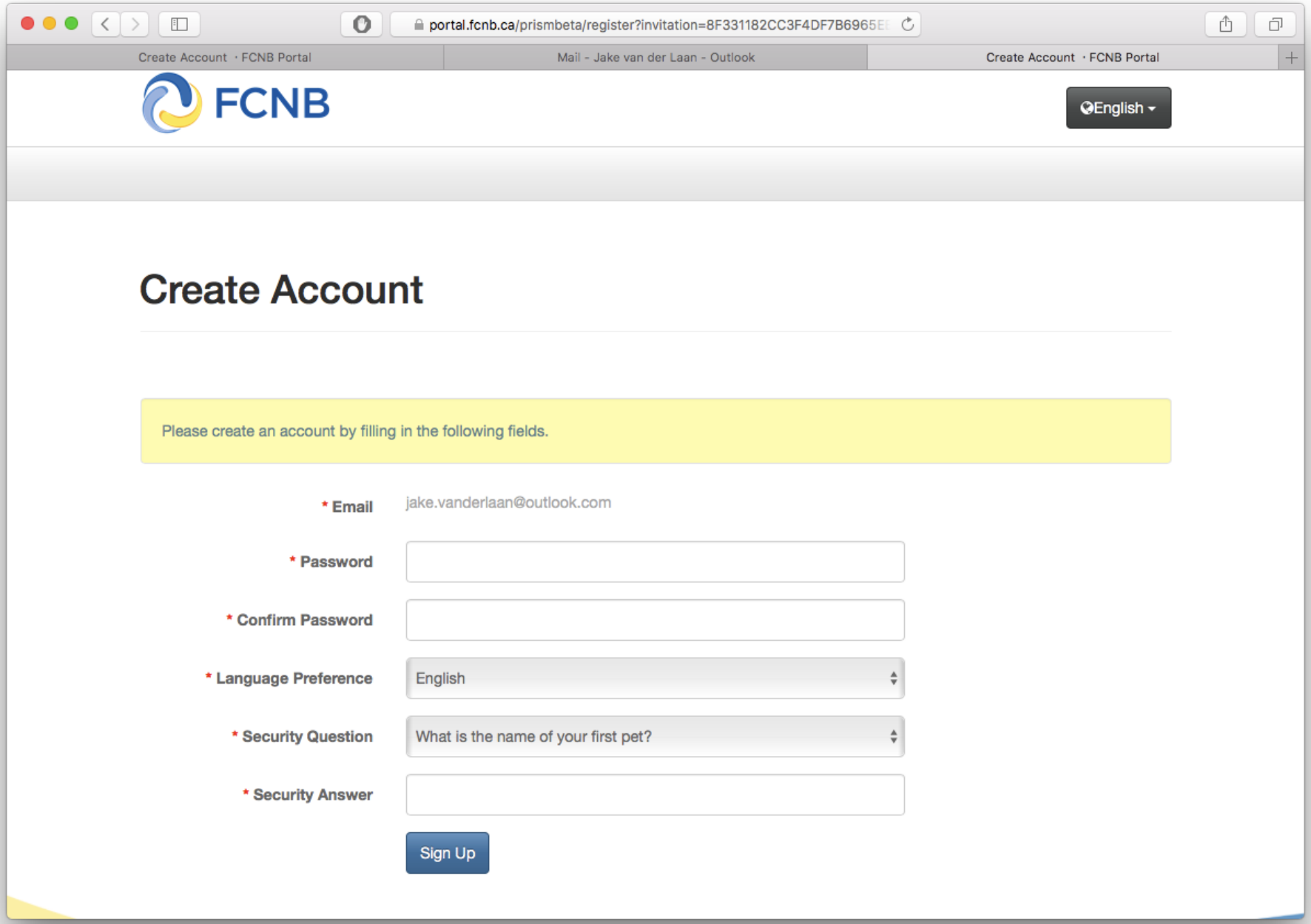
portal.fcnb.ca/prismbeta/register?invitation=8F331182CC3F4DF7B6965E
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English
Create Account
Please create an account by filling in the following fields.
* Email
jake.vanderlaan@outlook.com
* Password
* Confirm Password
* Language Preference
English
* Security Question
What is the name of your first pet?
* Security Answer
Sign Up

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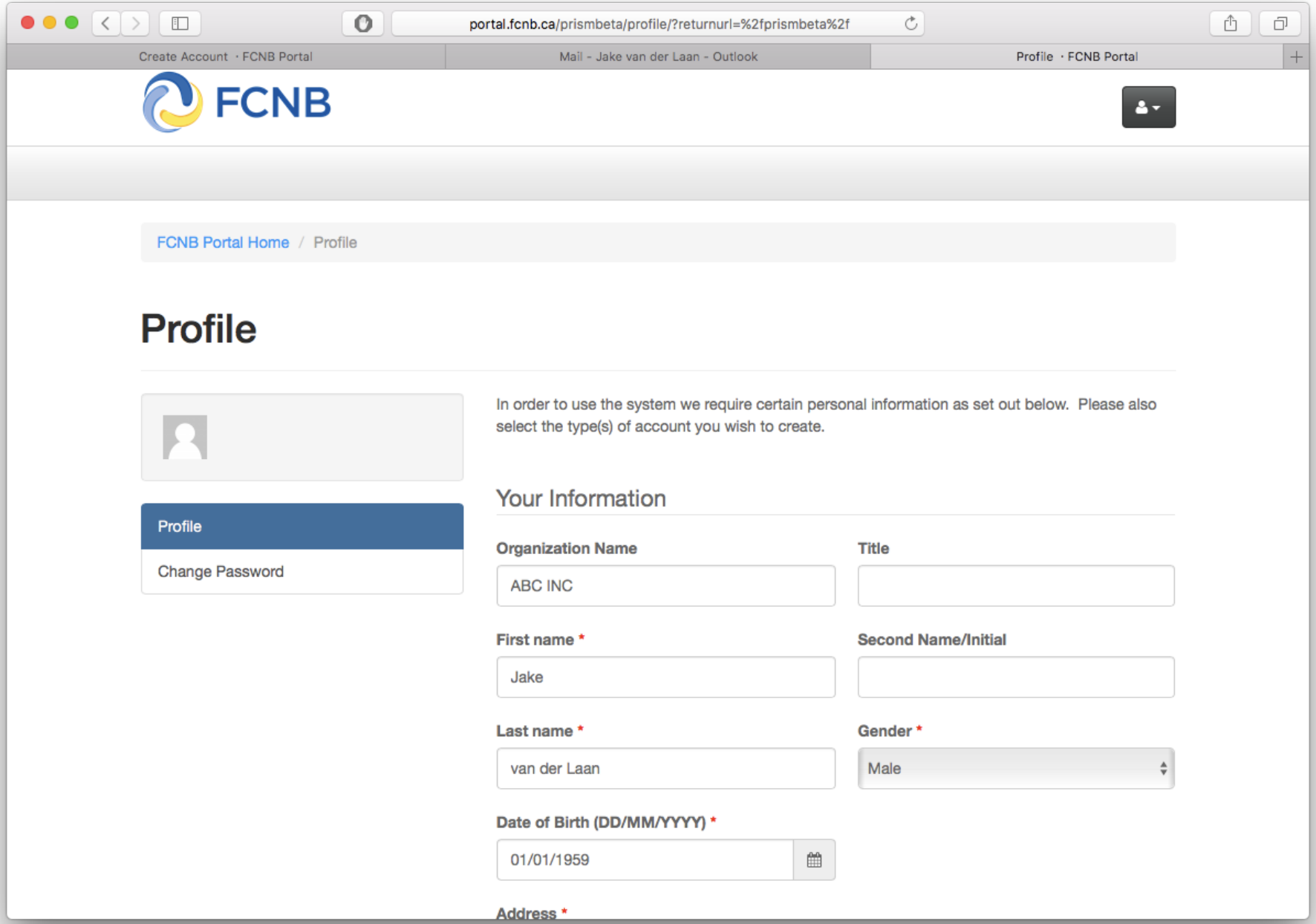
portal.fcnb.ca/prismbeta/profile/?returnurl=%2fprismbeta%2f
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Profile · FCNB Portal
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FCNB Portal Home / Profile
Profile
Profile
Change Password
In order to use the system we require certain personal information as set out below. Please also select the type(s) of account you wish to create.
Your Information
Organization Name
ABC INC
Title
First name *
Jake
Second Name/Initial
Last name *
van der Laan
Gender *
Male
Date of Birth (DD/MM/YYYY) *
01/01/1959
Address *

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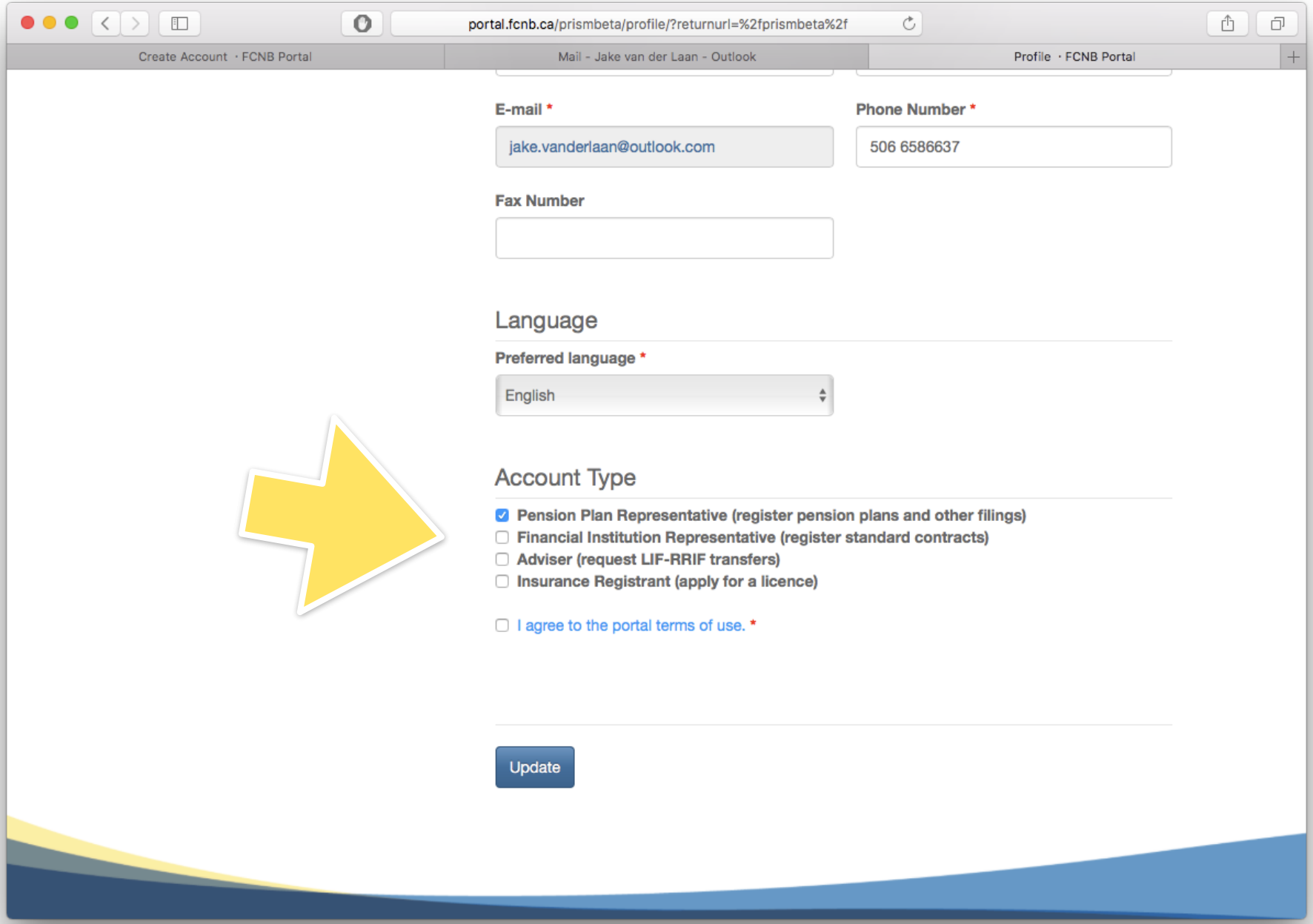
portal.fcnb.ca/prismbeta/profile/?returnurl=%2fprismbeta%2f
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Mail - Jake van der Laan - Outlook
Profile · FCNB Portal
E-mail *
jake.vanderlaan@outlook.com
Phone Number *
506 6586637
Fax Number
Language
Preferred language *
English
Account Type
Pension Plan Representative (register pension plans and other filings)
Financial Institution Representative (register standard contracts)
Adviser (request LIF-RRIF transfers)
Insurance Registrant (apply for a licence)
I agree to the portal terms of use. *
Update

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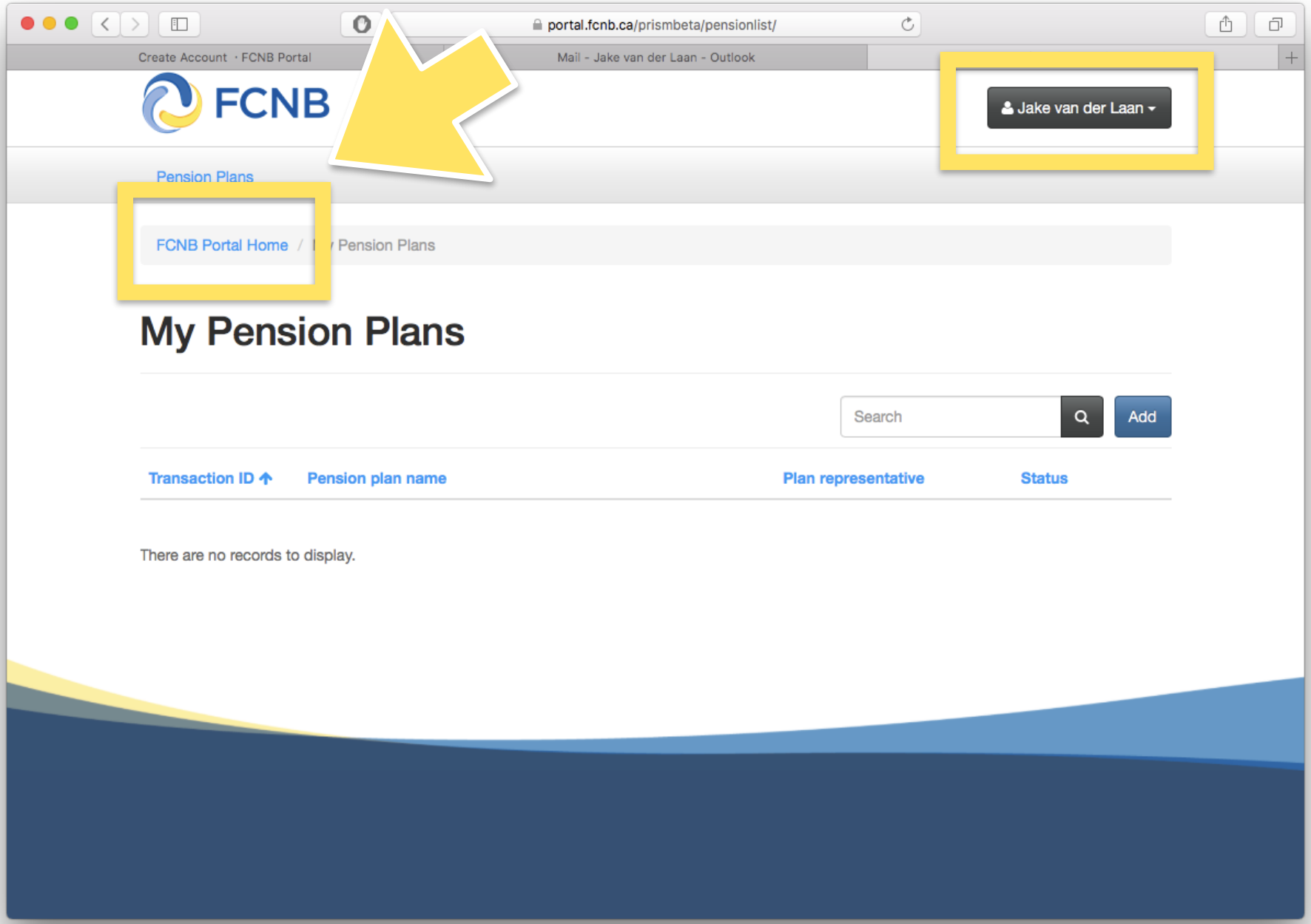
portal.fcnb.ca/prismbeta/pensionlist/
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Pension Plans
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My Pension Plans
Search
Add
Transaction ID
Pension plan name
Plan representative
Status
There are no records to display.

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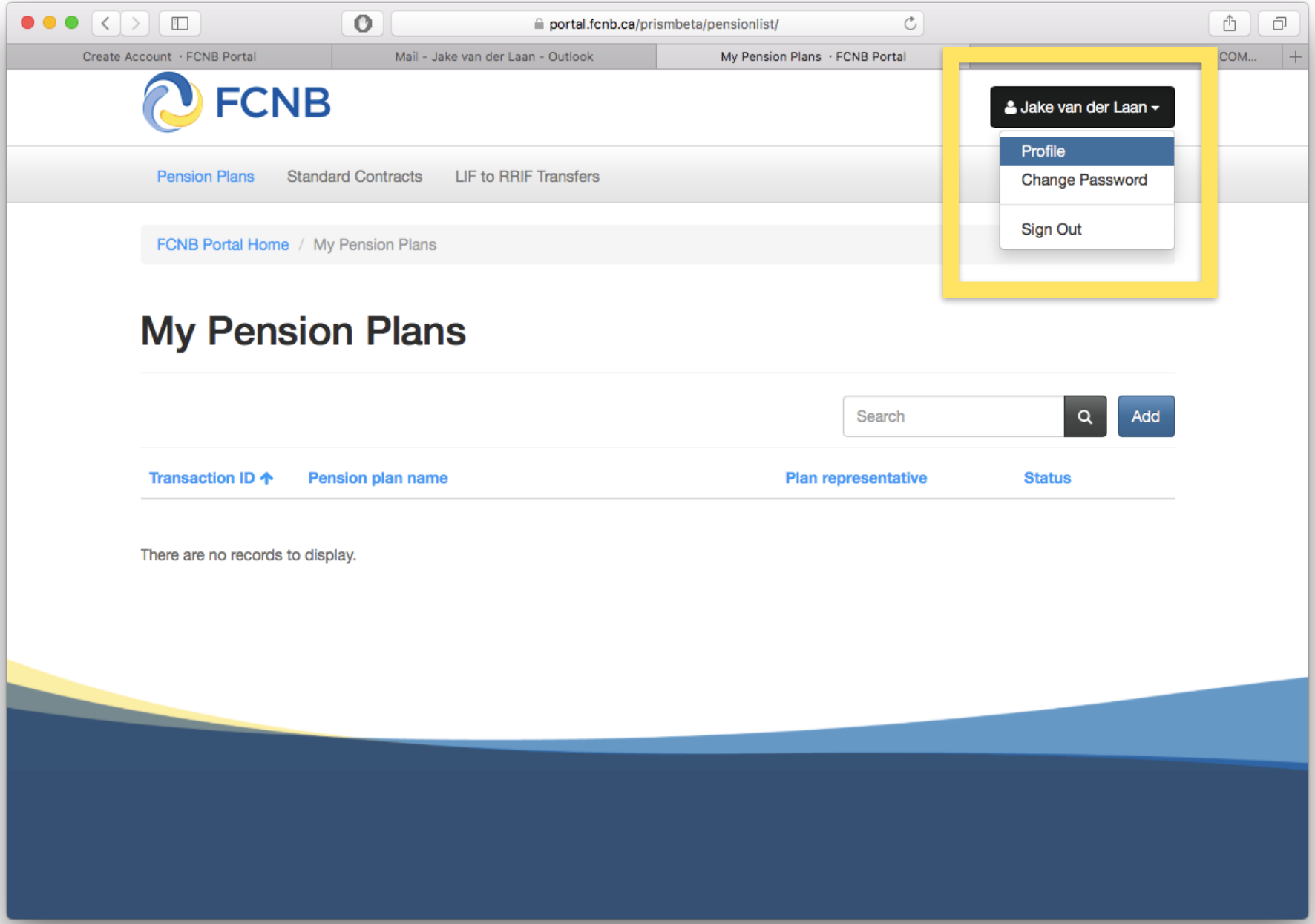
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LIF to RRIF Transfers
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Search
Add
Transaction ID
Pension plan name
Plan representative
Status
There are no records to display.

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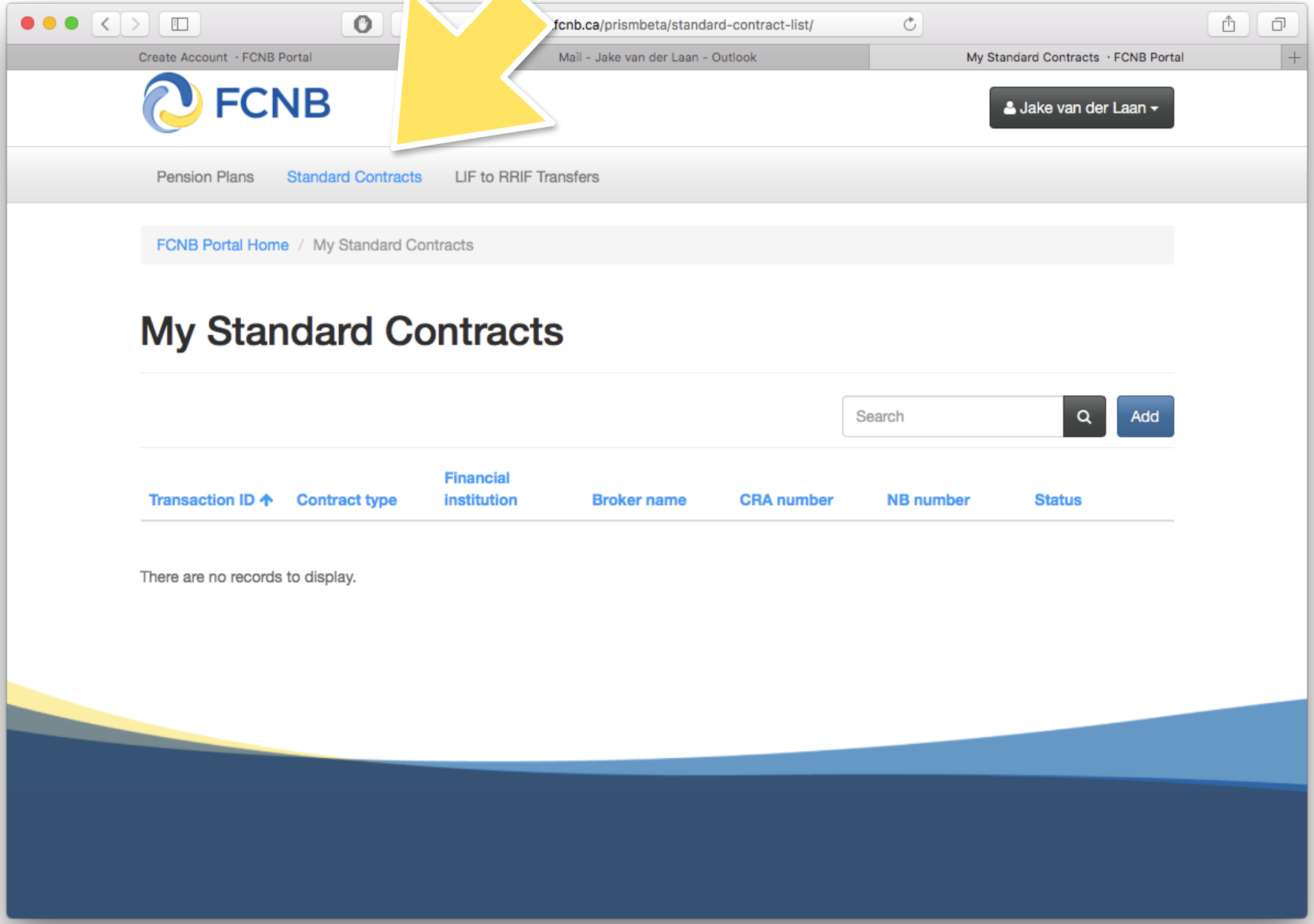
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My Standard Contracts
Search
Add
Transaction ID
Contract type
Financial institution
Broker name
CRA number
NB number
Status
There are no records to display.

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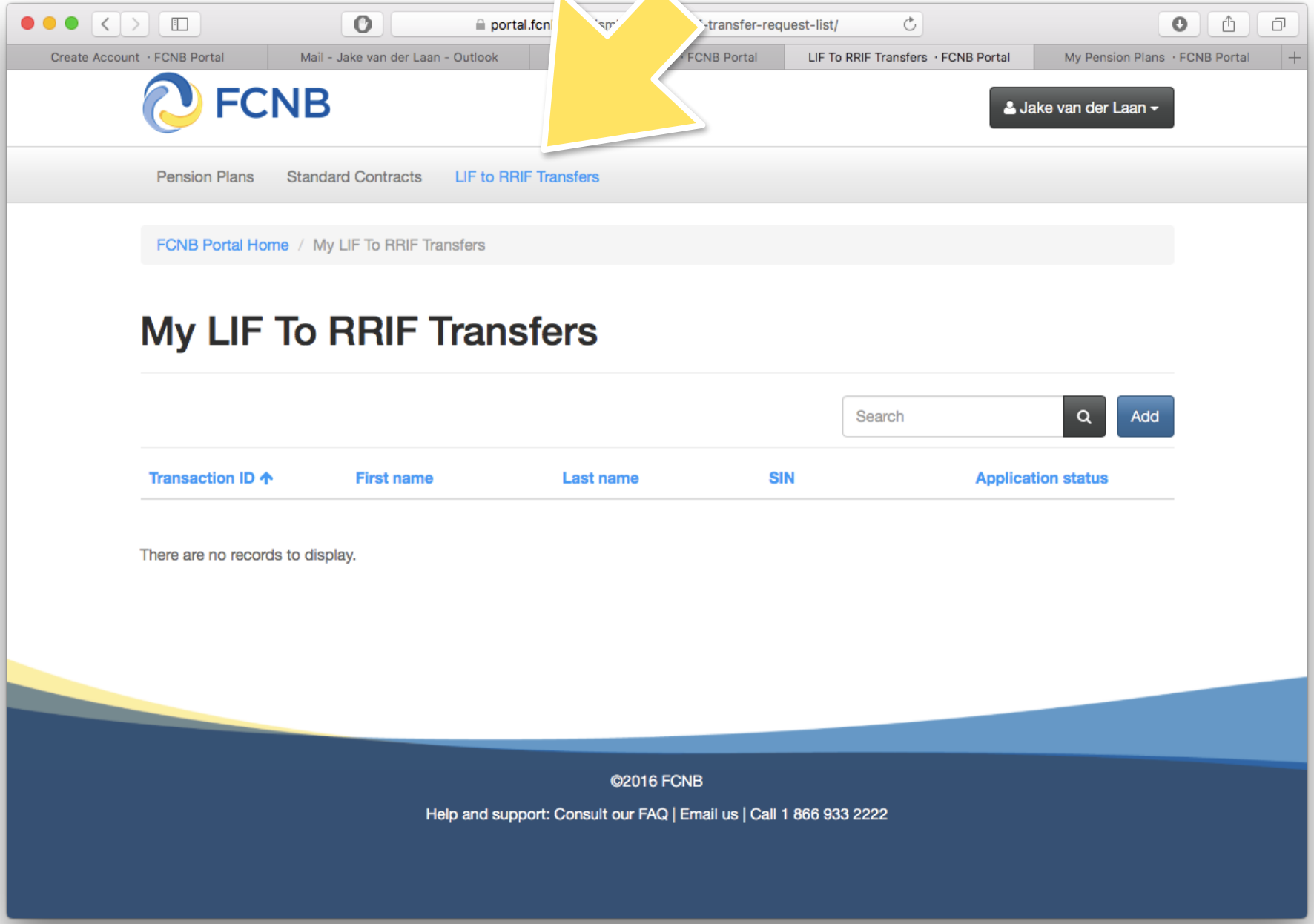
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Search
Add
Transaction ID
First name
Last name
SIN
Application status
There are no records to display.
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go to process specific slides

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