

Registering a pension plan


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Transaction ID ↑	Pension plan name	Plan representative	Status
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New Pension Plan Registration

Pension plan name and contact details

Before beginning the online application process, we urge you to review our FAQ and particularly our "Before you Begin" document, to ensure you have the required information and documents which you will need to complete this application. The FAQ, which contains a link to the "Before you Begin" document, is available [here](#) (this link will open in a separate window).

Registering a new pension plan involves your providing us with information about the plan by way of entering data in a series of steps. Once you have completed entering this information, you will then be asked to upload supporting documents. At the end of the application process you will be asked to either pay the application fee online or be invoiced. Once your plan registration application has been submitted, you will be required to complete a separate Actuarial Valuation Report (AVR) or Cost Certificate filing process (depending on the type of plan you have applied to register) before your application can be reviewed by FCNB for approval. This option will appear in your pension plan list once you have successfully completed this initial pension plan application process.

Please note: Your application will be automatically saved as a draft once you have completed the first screen and will be re-saved as you progress further. You are free to leave the process at any time and return later to continue completing your application.

You will receive a confirmation email once you have successfully submitted your application.

The first step in the process is to provide the pension plan name and administrator details. Fields with a red asterisk are mandatory and must be populated. Please note that with respect to the "Alternate plan name" field, if your plan has a name in the other official language, you should enter it there.

When you have populated all required fields, click 'Next' to proceed to the next step.

portal.fcnb.ca/prismbeta/pensionlist/pension-create/

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Pension plan name * **Plan representative**

Fantastic Pension Plan Inc. Jake van der Laan

Alternate plan name **Plan administrator ***

Fantastic Pension Plan Inc. (french name) KLM Pension Administrators

Plan administrator address

Address line 1 * **Address line 2**

1 Main Street Suite 3400

City * **Province ***

Saint John New Brunswick

Postal code *

E4L 5F6


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New Pension Plan Registration

5%

Plan reference ID

This application is to register your plan as a New Brunswick based pension plan.

If you have an internal Plan reference ID, you may enter it below.

Then click 'Next' to proceed.

Plan reference ID

Jurisdiction *

New Brunswick ▾

Next

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Plan administrator

Please select the type of pension plan administrator from the dropdown menu. Depending on your selection you may be asked to provide additional detail of the members of any board or committee.

Plan administrator *

KLM Pension Administrators

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The administrator is a/an: *

✓

Employer or employers

Pension committee

Board of trustees

Insurance company

Person, board or commission

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Plan administrator

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Plan administrator *

KLM Pension Administrators

The administrator is a/an: *

Pension committee

Pension administrator board or committee members

Add

Name ↑	Effective date	Mailing address	Telephone	Representative of	Details
There are no records to display.					

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Peter Jones

Mailing address *

34 Park Street
Moncton, NB
4D4S66

Effective date - date appointed (DD/MM/YYYY)

01/09/2016

Telephone *

506 858 5555

Representative of a/an: *

Employer(s)

Submit

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Plan administrator

Please select the type of pension plan administrator from the dropdown menu. Depending on your selection you may be asked to provide additional detail of the members of any board or committee.

Plan administrator *

KLM Pension Administrators

The administrator is a/an: *

Pension committee

Pension administrator board or committee members

Add

Name ↑	Effective date	Mailing address	Telephone	Representative of	Details
Peter Jones	01/09/2016	34 Park Street Moncton, NB 4D45G6	506 858 5555	Employer(s)	<div></div>

Previous

Next

Close

Plan administrator

Please select the type of pension plan administrator from the dropdown menu. Depending on your selection you may be asked to provide additional detail of the members of any board or committee.

Plan administrator *

KLM Pension Administrators

The administrator is a/an: *

Pension committee

Pension administrator board or committee members

Add

Name ↑	Effective date	Mailing address	Telephone	Representative of	Details
Mary Conrad	01/07/2016	34 Main Street Bathurst, NB 3R4 6H7	506 777 8765	Member of the plan	▼
Peter Jones	01/09/2016	34 Park Street Moncton, NB 4D4S66	506 858 5555	Employer(s)	▼

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Plan type details

Please select the type of plan you are applying to register (i.e. whether it is a defined benefit, defined contribution or shared risk plan) from the drop down menu, and then provide the additional information required for that plan type.

Indicate if a collective agreement applies and if other employer plans are involved. Also indicate if the new plan is being established as a result of the sale, assignment or disposition of a business, the merger of two or more pension plans, a conversion of a previous plan, the splitting of a previous pension plan or the cessation of employer contributions. You may also be required to enter details about the other employer's plan(s) and/or previous pension plan(s), if applicable. **(Please note:** if there is another plan which has not yet been registered, please enter "pending" in the Registration number field when adding the plan details below.)

Then please provide details regarding the custodian of the pension funds. Please note that the grey fields below will be populated based on the email address you enter for the administrator and custodian. If the email for the custodian is not in our records, you will be asked to provide further contact details during the following step.

Finally, enter each employer who is required to make contributions to the plan or who has employees required to make contributions to the plan.

Type of plan being registered *

Date on which the plan is established (DD/MM/YYYY) *

FCNB

portal.fcnb.ca/prismbeta/pensionlist/pension-edit?id=0a285a

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Type of plan being registered *

Defined benefit plan

Date on which the plan is established (DD/MM/YYYY) *

01/09/2016

Basis of making pension payments *

Final average earnings over last n years

Number of employers *

More than one - multi-employer plan

Year End

Year end month *

August

Year end day *

31

☒ Members of the plan are subject to a collective agreement ☐ There are other plans maintained by this employer

Reason for plan creation

Plan is established as the result of: *

This is a new pension plan

Custodian of pension funds

☐ Benefits are guaranteed by an insurance company

Name of pension fund (custodian of the pension funds) *

Pension fund administrator email *

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jake.vanderlaan@outlook.com

Funds custodian (if not the pension fund)

Actuary name

Actuary email

jake.vanderlaan@outlook.com

Actuary

Add each employer who is required to make contributions to the plan or who has employees required to make contributions to the plan*

Add

Employer legal name ↑	Employer is	Details	Main activity	Nature of the business	Details	
NASA	A corporation		Space exploration	Other (please provide details)	Engineering and research	☑

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33%

Member statistics

Please enter the number of male and female member for each jurisdiction in which the plan has participants. To edit a particular jurisdiction, click on the button at the end of the appropriate row and then select 'Edit'. This will open a new window where you can update the number of male and female former and current members. Click 'Submit' when done to return to this page. Repeat the process for each applicable jurisdiction. Then click 'Next' to proceed.

You can sort a particular column in descending order by clicking on the corresponding heading. Click again to sort in ascending order. As an example, to sort the "Number of members" column in ascending order (least members first) click that heading twice.

Please note that in order to register a pension plan in New Brunswick, the **majority of members of the plan need to be residents of New Brunswick**.

Jurisdiction ↑	Number of male members	Number of female members	Number of members	Number of former members	Number of male former members	Number of female former members	
Alberta	0	0	0	0	0	0	▾
British Columbia	0	0	0	0	0	0	▾

portal.fcnb.ca/prismbeta/pensionlist/pension-edit/?id=0a285a						
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Jurisdiction ↑	Number of male members	Number of female members	Number of members	Number of former members	Number of male former members	Number of female former members
Alberta	0	0	0	0	0	0
British Columbia	0	0	0	0	0	0
Federal	0	0	0	0	0	0
Manitoba	0	0	0	0	0	0
New Brunswick	0	0	0	0	0	0
Newfoundland and Labrador	0	0	0	0	0	0
Northwest Territories	0	0	0	0	0	0
Nova Scotia	0	0	0	0	0	0
Nunavut	0	0	0	0	0	0
Ontario	0	0	0	0	0	0
Outside Canada	0	0	0	0	0	0
Prince Edward Island	0	0	0	0	0	0
Quebec	0	0	0	0	0	0
Saskatchewan	0	0	0	0	0	0
Yukon	0	0	0	0	0	0

0

Edit

0

portal.fcnb.ca/prismbeta/pensionlist/pension-edit/?id=0a285a

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Jurisdiction Number of male Number of female Number of Number of former Number of male Number of female

Edit

Member Statistics

Jurisdiction *

New Brunswick

Number of male members *

0

Number of female members *

0

Number of male former members

0

Number of female former members

0

Submit

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Manitoba	0	0	0	0	0	0		▼
New Brunswick	56	58	114	0	0	0		▼
Newfoundland and Labrador	0	0	0	0	0	0		▼
Northwest Territories	0	0	0	0	0	0		▼
Nova Scotia	0	0	0	0	0	0		▼
Nunavut	0	0	0	0	0	0		▼
Ontario	0	0	0	0	0	0		▼
Outside Canada	0	0	0	0	0	0		▼
Prince Edward Island	0	0	0	0	0	0		▼
Quebec	0	0	0	0	0	0		▼
Saskatchewan	0	0	0	0	0	0		▼
Yukon	0	0	0	0	0	0		▼

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41%

Plan details

Please enter the required pension plan details below. Select the principal employer type from the dropdown. Then please indicate, with respect to the included employment item, whether any members are employed in an activity that is within the authority of the federal *Pension Benefits Standards Act* (for example, activity relating to communication, banking or interprovincial transportation.)

Then enter the principal employer contact information if different from the plan administrator. Select the funding instrument, class(es) of eligible employees and new employee eligibility options. Indicate whether the plan is integrated with C/QPP.

Then click 'Next' to proceed.

Principal employer type

Included employment

☐ The principal employer is the same as the plan administrator

Principal employer contact information

Principal employer *

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50%

Employee contribution

Please select the applicable employee contribution rate methodology from the dropdown and indicate if employees have the option to make additional voluntary contributions.

Then click 'Next' to proceed.

Employee contribution rate methodology *

Additional contributions

☐ Employees are permitted to make additional voluntary contributions

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Employer contribution

Please enter the required employer contribution details below. Select the employer contribution rate and current service benefits from the dropdowns and enter any other information required based on your selections.

Also enter normal retirement and special retirement specifics. Then click 'Next' to proceed.

Employer contribution rate - current service *

Current service benefits *

Normal retirement


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66%

Statistics Canada details

Please enter some additional information about the plan which is required by Statistics Canada.

Lastly, every pension plan registered in New Brunswick must be LIF/LIRA transferable. Please confirm this to be the case by checking the applicable checkbox.

Then click 'Next' to proceed.

Maximum period for vesting (months) *

Entitlement to surplus on wind-up *

How are the administrative costs paid? *


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75%

Defined Benefit or Shared Risk Plan adjustment and death benefit

Please enter details with respect to automatic adjustments and death benefits provided under the plan. Please note that selecting certain options from the dropdowns will result in request for additional details.
Once all details have been fully filled out, click 'Next' to proceed.

Automatic adjustment to pensions provided for in plan? *

Death benefits after retirement normal form of pension for single pensioner *

Is plan a *

Death benefits after retirement - for married pensioner

Is joint and survivor or spouse's pension provided? *


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Upload documents

You have completed the data entry portion of the application process. Based on your selections during the application process, you must now upload the documents listed below.

Please note: If any governing body resolutions are required for any of the required documents (such as for example a resolution of a Board of Trustees approving a Funding Policy), then please ensure that a copy of the applicable resolution is uploaded with the approved document.

How to upload a document:

- Place all files to be uploaded in the same directory or folder on your computer.
- Click the "Browse" button for a particular item to upload. A window to access files on your computer will appear. Browse to the folder containing your files.
- Select the file(s) on your computer (hold down the CTRL key to select multiple files) and click "Open" in the window. The text box to the left of the "Browse..." button should now indicate the selected files.
- Repeat this process for each item requiring document upload. Add any documents not within a particular category under the "Additional documents" item.
- Once you have selected files for all items, click "Upload". This will upload all your documents simultaneously.
- Once complete, uploaded documents will appear with the item with respect to which they were uploaded. Please ensure that all documents you wanted to upload are listed. Add further documents by clicking "Browse..." again. (Note that an additional Browse and Upload will add to the uploaded list and will not replace previously uploaded files. To delete a particular uploaded file, click the little garbage can to the right of the file.)



portal.fcnb.ca/prismbeta/pensionlist/pension-edit/?id=0a285a60-b884-e

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- Once complete, uploaded documents will appear with the item with respect to which they were uploaded. Please ensure that all documents you wanted to upload are listed. Add further documents by clicking "Browse..." again. (Note that an additional Browse and Upload will add to the uploaded list and will not replace previously uploaded files. To delete a particular uploaded file, click the little garbage can to the right of the file.)

Collective agreement *

Browse...

Member eligibility statement

Browse...

Deposit contracts with an insurance company

Browse...

Employee booklet

Browse...

Group annuity contract

Browse...

Pension plan text *

Browse...

portal.fcnb.ca/prismbeta/pensionlist/pension-edit/?id=0a285a60-b884-e1

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garbage Documents Search

Name	Date Modified	Size	Kind
TestDocument10	Today, 11:16 AM	40 KB	PDF Docu
TestDocument9	Today, 11:16 AM	40 KB	PDF Docu
TestDocument8	Today, 11:16 AM	40 KB	PDF Docu
TestDocument7	Today, 11:15 AM	40 KB	PDF Docu
TestDocument6	Today, 11:15 AM	166 KB	Micros...cu
TestDocument5	Today, 11:15 AM	166 KB	Micros...cu
TestDocument4	Today, 11:15 AM	166 KB	Micros...cu
TestDocument3	Today, 11:15 AM	164 KB	Micros...cu
TestDocument2	Today, 11:14 AM	164 KB	Micros...cu
TestDocument1	Today, 11:14 AM	164 KB	Micros...cu
Jake	Today, 11:10 AM	--	Folder
Microsoft User Data	Apr 1, 2016, 7:40 AM	--	Folder

Collective agree

Member eligibility

Deposit contract

Employee bookle

Group annuity contract

Pension plan text *

Reciprocal transfer agreement

Cancel Choose

Browse... Browse... Browse...

portal.fcnb.ca/prismbeta/pensionlist/pension-edit/?id=0a285a60-b884-e8

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Reciprocal transfer agreement

[Browse...](#)

Trust agreement or investment contract *

TestDocument5.docx [Browse...](#)

Funding policy

[Browse...](#)

SIPG or investment policy *

TestDocument6.docx [Browse...](#)

Additional documents

[Browse...](#)

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Browse...

Trust agreement or investment contract *

TestDocument3.docx

Browse...

Funding policy

TestDocument4.docx

Browse...

SIPG or investment policy *

TestDocument5.docx

Browse...

Additional documents

Browse...

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91%


Validation and confirmation

You have completed the data entry and document upload portions of your application. If you wish to review and/or edit any of your data entries or document uploads, you may use the 'Previous' button to navigate back through the previous steps.

Once you are satisfied with the data entered and documents uploaded, we ask that you validate and confirm your application by checking the box below.

After submission, you will receive an email confirming receipt of your application.

Please note: Once your plan registration application has been submitted, you will be required to complete a separate Actuarial Valuation Report (AVR) or Cost Certificate filing process (depending on the type of plan you have applied to register) before your application can be reviewed by FCNB for approval. This option will appear in your pension plan list once you have successfully completed this initial pension plan application process.



☐ I confirm that I am authorized to make this application for registration on behalf of the pension plan, that all information provided in this application is accurate and complete, and that no material information has been omitted. *

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100%

Fee summary

The total amount due for this application or filing, including any applicable late filing fee and/or interest, is set out below. You have the option to pay online or be invoiced. Please select the manner in which you wish to pay, and click 'Submit' to proceed.

For more information about INTERAC Online, please consult www.interaonline.com/learn.

Description	Amount
Transaction ID	160101223
Fee	\$570.00
Late fee	\$0.00
Interest charged	\$0.00
Total due	\$570.00

☒ Pay online with debit or credit card

☐ Send me an invoice

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Submit


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Transaction ID ↑	Pension plan name	Plan representative	Status
160101223	Fantastic Pension Plan Inc.	Jake van der Laan	Require Initial AVR/CC

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Initial AVR


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Pension Plan Details

Fantastic Pension Plan Inc.

Plan Administrator: KLM Pension Administrators

Edit Initial AVR or CC

View Pension


Delegated Parties

Add

First name ↑	Last name	Email
There are no records to display.		

Related Filings

Transaction ID	Type	Created on ↑	Status
160101228	Actuarial Valuation Report Filing	27/09/2016 12:56 PM	Draft




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Actuarial Valuation Report Filing

0%

Valuation date and report type

The Actuarial Valuation Report (AVR) filing process involves entering the material data contained in the Actuarial Valuation Report and then uploading a copy of the document(s).

Please note that the uploaded document(s) will constitute the official filing. Any discrepancy between data entered online and the uploaded documents will be resolved in favour of the latter.

Please begin by selecting the valuation date of this AVR and the specific type of valuation report filing you are making.

Plan with respect to which filing is made

Fantastic Pension Plan Inc.

Plan registration number

Valuation date (DD/MM/YYYY) *

portal.fcnb.ca/prismbeta/pensionlist/avr-edit/?id=07b8f302-cb84-e611-9...

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Please begin by selecting the valuation date of this AVR and the specific type of valuation report filing you are making.

Plan with respect to which filing is made

Fantastic Pension Plan Inc.

Plan registration number

Valuation date (DD/MM/YYYY) *

01/09/2016

Report type *

Initial

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Actuarial Valuation Report Filing

11%

Going concern calculations

Please enter the asset and liability values from the AVR, on the basis of which the going concern valuation is made. Calculated values will be calculated in the right column based on the data you enter.

If there are liabilities for other participants, please enter that amount in the last field in the left column. If there are none, please enter 0 (zero). Please note that if an amount greater than zero is entered in this field, you will be required to provide details of who these other participants are in an additional text field which will appear.

Assets	Calculated values
A. Going concern assets *	F. Total liabilities (B+C+D+E)
<input type="text"/>	<input type="text" value="0.00"/>
Liabilities	G. GC funded position (A-F)
B. For active members *	<input type="text" value="0.00"/>

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Please note that if an amount greater than zero is entered in this field, you will be required to provide details of who these other participants are in an additional text field which will appear.

Assets

A. Going concern assets *

1,900,000.00

Liabilities

B. For active members *

980,000.00

C. For deferred members *

0.00

D. Pensions in pay (retired/beneficiaries) *

0.00

E. For other participants *

0.00

Calculated values

F. Total liabilities (B+C+D+E)

980,000.00

G. GC funded position (A-F)

920,000.00


H. Going concern ratio (A/F)

1.94

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22%

Going concern assumptions

Please enter the methods used for valuing going concern liabilities and going concern assets as well as the mortality table used, from the drop down menu below.

Then confirm whether the withdrawal rate was used and check the applicable box if the plan is hourly paid (in which case you will be asked to enter the assumed hours per year).

Then please enter the various applicable interest rates in the grid. If the rate is for the full term, please enter 99 in any applicable line in the "years" column.

Then confirm that the data on this page describes the assumed growth rates. If it does not, leave the checkbox unchecked and enter an explanation in the corresponding text field.

Assumptions

Method of valuing going concern liabilities *


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33%

Normal cost and special payments calculations

Please enter the member and employer contributions to the plan during the reporting period for the defined benefit (DB) provisions of the plan, as well as the defined contribution (DC) provisions of the plan (if any).

Then please enter any special payments required during the reporting period and verify that the calculated minimum total employer contribution is consistent with your records.

Please note that if you enter any amount in field "G. Other", a further text field will appear where you should add a description.

DB provisions	Annual calculated
A. Members annual contributions *	F. Total special payments (going concern and solvency), if any *
<input type="text"/>	<input type="text"/>
B. Employers annual contributions *	G. Other (please add description after entering amount)
<input type="text"/>	<input type="text"/>


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44%

Solvency calculations

Please enter the gross solvency assets, wind-up expense, present value of special payments, and member liabilities amounts, on the basis of which the solvency valuation is made.

Again, please note that the solvency funded position and applicable ratios for the plan will be calculated in the right column. Please ensure these are consistent with your records.

Assets	Calculated values
A. Gross solvency assets *	Solvency funded position (C+D-E)
<input type="text"/>	0.00
B. Wind-up expenses *	Transfer ratio ((A-B)/E)
<input type="text"/>	0.00
C. Net value of assets (A-B)	Solvency ratio ((A-B+D)/E)


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55%

Solvency assumptions

Please enter the methods used for valuing solvency assets and liabilities as well as the mortality table used, from the drop down menu below.

Then please enter the various applicable interest rates in the grid. If the rate is for the full term, please enter 99 in any applicable line in the "years" column.

Please note: You must enter data in at least one of the "CV initial interest", "Deferred annuity rate", and "Immediate annuity rate" fields. If you enter data in the "CV initial interest" field, you will also be required to enter data in the other data fields in the corresponding row.

Then please confirm whether indexing was included in the liabilities valuation.

Finally, provide any additional information relevant to the assumptions in the "Additional information" field provided.

Assumptions

Method of valuing solvency liabilities *


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66%

Additional information

Please provide any additional information which may assist us in reviewing your AVR filing. If you have none, click "Next".

Additional information

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77%

Upload documents

Please upload any documents relating to or supporting your filing or which may assist us in our review, if any.

How to upload a document:

- Click the "Browse" button. A window to access files on your computer will appear.
- Find the file on your computer, select it and click "Open" in the window. The file name will appear in the text box between "Browse" and "Upload".
- Click "Upload".
- The file will upload, which may take a few seconds. **Do not click anything else until the page refreshes and the uploaded file appears between the document category and the "Browse ... Upload" line.**
- Repeat this process, until all your files are listed as having been uploaded on the page.

Please note:

- You can upload multiple documents under each category. Just click the "Browse..." button for that category again after uploading a document.
- It is not possible to do multiple "Browse" selections before clicking "Upload". Files must be uploaded one at a time. If you select "Browse" before an upload is complete, the prior upload will likely fail.


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88%

Validation and confirmation

You have completed the data entry and document upload portions of the AVR filing process. If you wish to review and/or edit any of your entries or uploads, you may use the "Previous" button to navigate back through the previous steps.

Once you are satisfied with the data entered and documents uploaded, we ask that you validate and confirm your filing by checking the box below.

After submission, you will receive an email confirming receipt.

☐ I confirm that I am authorized to make this filing on behalf of the pension plan and that the information provided in this filing is true and correct to the best of my knowledge and that no material information has been omitted. *

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Submit

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Q

Add


Transaction ID ↑	Pension plan name	Plan representative	Status
160101223	Fantastic Pension Plan Inc.	Jake van der Laan	Submitted

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portal.fcnb.ca/prismbeta/pensionlist/

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Transaction ID ↑	Pension plan name	Plan representative	Status
160101223	Fantastic Pension Plan Inc.	Jake van der Laan	Registered

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Related filings

portal.fcnb.ca/prismbeta/pensionlist/dashboard/?id=0a285a60-b884-e61

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Pension Plan Details

Fantastic Pension Plan Inc.

Plan Administrator: KLM Pension Administrators

Delegated Parties

First name ↑	Last name	Email
There are no records to display.		

Related Filings

✓ Actuarial Valuation Report Filing

Amendment Registration

Annual Information Return Filing

Filing Date Extension Request

SIPG Review Filing

Transfer Approval Request

Wind-up Request

Add

Status

Submitted


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Annual Information Return Filing

0%

Filing period and books and records

The Annual Information Return (AIR) filing process involves the collection and/or verification of pension plan data over a series of steps.

BEFORE YOU BEGIN PLEASE NOTE: In order to complete the filing of an Annual Information Return, the filer will be required to confirm (at the next step) that all amendments which took effect during the filing period have been submitted to FCNB for registration. If this has not been done, please complete that step first, by selecting and completing an "Amendment Registration" filing from the "Related Filings" menu for this pension plan.

Before proceeding with the AIR filing, please note the filing period below and verify you have all required records and data to proceed. Then confirm particulars of where the books and records of the pension plan are currently maintained, and click 'Next' to continue.

Pension plan with respect to which AIR is being filed

Fantastic Pension Plan Inc.

Please select the period to which this AIR applies.

From: (DD/MM/YYYY) *

01/09/2016

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Pension Plan Details

Fantastic Pension Plan Inc.

Plan Administrator: KLM Pension Administrators

View Pension

Delegated Parties

Add

First name ↑Last nameEmail

There are no records to display.

Related Filings

Actuarial Valuation Report Filing

Add

Transaction ID	Type	Created on ↑	Status
160101232	Annual Information Return Filing	27/09/2016 13:52 PM	Draft
160101228	Actuarial Valuation Report Filing	27/09/2016 12:56 PM	Submitted

Test site:

<https://portal.fcnb.ca/prismbeta/>

Questions?