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Total Cost Reporting ? What You Need to Know

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Advocacy Bulletin

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Total Cost Reporting ? What You Need to Know

Total Cost Reporting is the way for both
investment and segregated funds

The securities and insurance regulators are proposing new Total Cost Reporting rules. Sometimes referred to as CRM-3, these proposals aim to improve the cost disclosure that your clients receive and harmonize requirements between mutual funds and segregated funds.

Source URL <https://globalpacific.ca/bulletins/advocis/2022-10-21/total-cost-reporting-%E2%80%93-what-you-need-know-bulletin>

We know that our members have questions about Total Cost Reporting. We've addressed several frequently asked questions in our latest Advocacy Bulletin.