



# Payroll Investment Plan (PIP) Implementation Steps

## Employer Set Up & Testing

### STEP 1

Advisor outreach to Employer(s)

### STEP 2

Employer approves PIP launch

### STEP 3

GOF supports the Employer's Payroll Department to set up deductions

### STEP 4

First Employee as test

## Employee Presentation & Set Up

### STEP 5

Advisor & GOF Presentation to Employees

- As many as required
- One page sign up form

### STEP 6

Advisor Paperwork:

- GOF Payroll Authorization Form (PAF) & Subscription Form
- New account set up forms through dealer
- Send to: [goldenopportunities@prometa.ca](mailto:goldenopportunities@prometa.ca) & Dealer

### STEP 7

Prometa opens Employee account @ \$0 balance & sends PAF to Employer's Payroll Department

### STEP 8

Every Pay Period

- Employer's Payroll Department remits contributions (via EFT or cheque) with Remittance Form to [goldenopportunities@prometa.ca](mailto:goldenopportunities@prometa.ca)

## Ongoing Employee Communication

### STEP 9

Prometa provides Employees with:

- Annual Statements (Dec. 31)
- Tax Receipts (T2C and RRSP)(Dec. 31 & Mar.)

Fund provides Employees with:

- Annual and Semi-annual Reporting & Updates

Accounts are held in Employee's name and can be accessed via Shareholder Access 24/7

### STEP 10

- Quarterly communications to Employees are distributed by GOF with Advisor, and Employees can modify, contributions as required.
- Advisor in Residence