Frequently asked questions for participants of National Bank Trust Group Retirement Plans

You will find below frequently asked questions about the transition as well as their answers. Please feel free to contact Customer Service at 1-877-413-1194 Monday through Friday, 8 a.m. to 8 p.m. ET if you have any further questions. Please note that a webinar is available in the **Learn section of the participant website**.

1. What can I do if I do not receive my access code?

The access code and temporary password format to access the new National Bank Trust participant website, available as of March 11, 2021, will be mailed to you at the beginning of March.

If you do not receive your access code, contact the National Bank Trust customer service at 1-877-413-1194 and a representative will be able to provide you this code.

2. What can I do if I cannot log into the new National Bank Trust website?

The new website will be accessible as of March 11, 2021, and you can access it with the access code and temporary password. If you experience any difficulties, contact customer service at 1-877-413-1194.

3. What can I do if I forget my password to access the new National Bank Trust site?

When you log in for the first time, using the temporary password, you will be invited to modify your password and answer identification questions. If you forget your password afterwards, you will be required to answer the identification questions, and the system will reset your password. If you are unable to answer the identification questions correctly, contact the National Bank Trust Customer Service at 1-877-413-1194 and a representative will reset your password for you.

4. How can I get my account information, especially if I do not have Internet access?

If you do not have access to the Internet and would like to obtain information or carry out transactions relating to your group retirement savings plans, contact customer service at 1-877-413-1194 and a representative will help you.

5. My personal information on my online profile is incorrect. What should I do?

If your name, address and other contact details are incorrect, you can correct them by clicking on the **Manage** tab, in the **Manage your profile** section. You simply click on **View your personal profile** and on **Modify**. If any other information is incorrect, you will need to contact your employer to ask them to correct your personal data.

6. I wish to modify the distribution of my contributions. How do I go about it?

Under the **Manage** tab, under the **Manage your investments** section, click on **Modify contributions**. You will also be able to choose the distribution of your portfolio by clicking on **Modify the distribution**.

7. I would like more information about my plans.

Under the **Learn** tab, you have access to various information about how your plans work, investment options and fees.

8. Where can I find my tax receipts or my annual statements?

For the first 60 days of the year 2021, your RRSP receipts will be sent to you by the mail. If you have not received them by mid-March, you can contact our customer service and we will send you a copy.

Afterwards, your tax receipts and annual statements will be provided in the **Monitor** tab of the participant site towards the bottom of the page.

9. What are the features of the Monitor section?

The **Monitor** section allows you to obtain precise information about your investments and your retirement planning. You have access to your account details, your fund allocation, account history and activity, and more. You can also find your tax receipts and annual statements.

10. What are the features of the Learn section?

The **Learn** section allows you to watch the welcome video, learn about how your plan (s) work, investment options and fees. You can also complete the Investor Profile Questionnaire and access the retirement planning calculator and more.

11. What are the features of the Manage section?

The **Manage** section allows you to perform your transactions, such as changing the distribution of your portfolio, modify your contributions if permitted, enrolling in a new plan and modifying your personal information.

12. What are the features of the Investment Performance section?

The **Investment Performance** section provides you with all the details you need about your investment returns, the unit value of your funds as well as your personalized rates of return.