



Professional Trustee Timeline

1

Every March

CDIC member financial institutions will send you, the Professional Trustee, a reminder to re-designate Professional Trustee Accounts (PTAs).

The reminder will indicate how to do this.

2

Every April

Provide your member financial institution with an attestation to maintain Professional Trustee Account (PTA) status.

Failure to re-attest means your trust deposits are subject to trustee disclosure rules.

3

From May until February

Be prepared to provide CDIC with [your beneficiary information](#), upon request.

Remember, you can add, remove, or amend PTA designations at any time.

The reminder process repeats annually.

Professional Trustees are responsible for maintaining their account designations and all required beneficiary information.