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Total Cost Reporting ? What You Need to Know

Submitted by Rica Zara on October 21, 2022 - 4:40pm



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

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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.

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