



Hello <%= targetData.Proper_First_Name %>,

We're reaching out today to remind you that federal tax law requires you to convert your registered savings into income by the end of 2024. You need to choose an option for your savings no later than the end of the year you turn 71.

Please note that the default income options for your plan recently changed.

[Click here for a summary of your options](#)

We can help make this big decision an easy one – call us to discuss which makes the most sense for you!

Connect with <%= targetData.RC_Name %>

<%= targetData.RC_Title %>.

[1-877-504-<%= targetData.LastFourDigits %> Ext <%= targetData.Extension %>](tel:1-877-504-<%= targetData.LastFourDigits %> Ext <%= targetData.Extension %>)

<%= targetData.RC_Email_Address %>

Monday to Friday, 8 a.m. to 8 p.m. ET

What if I don't need income now?

That's okay! When you select an income solution, we can defer the start of your income payments until December 2025.

What happens if I do nothing?

At the end of the year, we'll convertⁱ your registered savings to the default option(s), depending on the products you currently hold and your province/territory of residence.

Take the time to fully understand your options. Contact us today.

ⁱ This could affect your taxes and may not support your current retirement plan. Cash payments are based on a threshold and are subject to withholding tax.

Life's brighter under the sun

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