



## MEMORANDUM

February 6, 2006

**TO:** Plan Administrators, consultants, and Interested Stakeholders of Federally Regulated Pension Plans Registered under the *Pension Benefits Standards Act, 1985*

**FROM:** Jeff Bee  
Director, Regulatory Information Division (RID)

**SUBJECT:** Update Memorandum on Electronic Filing of the Annual Information Return (OSFI 49) and Certified Financial Statements (OSFI 60)

Further to our April 2003 memorandum (from Henri Boudreau), this is to advise you that the transitional period (from hard copy to electronic filing) will end September 30, 2006. Therefore, effective with the 2006/2007 year ends, we will no longer accept hard copy returns. **The 2006/2007 return must be filed electronically.**

You have the option, as previously advised, of developing your own software. Plan administrators and other interested parties who produce the diskette filing software must ensure that the software is in accordance with OSFI specifications. The software, and each updated version used to produce diskette filing of forms OSFI 49 and OSFI 60 will have to be tested and approved by OSFI before the diskette filing is accepted as a filed return. Plans that are required to file an Auditor's Report must continue to do so.

Plan administrators who do not wish to develop the software may purchase a software package called Pension Pro\* at <https://www.pwcpro.com/pwcpro.nsf/>. You may also contact Catherine MacLellan at 1-877 208-7100 or [catherine.maclellan@shaw.ca](mailto:catherine.maclellan@shaw.ca) or Aman Gill at 1-866 867-5126 or [aman.s.gill@ca.pwc.com](mailto:aman.s.gill@ca.pwc.com).

**The returns for the fiscal year end for 2005/2006 will be the final hard copy returns distributed by OSFI.** Although we will accept hard copies for this year, you are encouraged to adopt diskette filing during the transitional phase. The Annual update memos, which have historically been sent with the returns, will now be posted on OSFI's web site in lieu of mailing. Please refer to the website at <http://www.osfi-bsif.gc.ca/> under Pensions/Filing Instructions and Returns/Diskette Filing. Questions regarding this initiative should be directed to Jasia Foottit, Database Applications Analyst at 613-990-7866 or [Jasia.Foottit@osfi-bsif.gc.ca](mailto:Jasia.Foottit@osfi-bsif.gc.ca)

\* While OSFI has tested and approved use of **Pension Pro** for filings with OSFI, this approval and any endorsement of the use of software created by PricewaterhouseCoopers should not be seen as an approval or endorsement of PricewaterhouseCoopers as a whole, or of any of its related entities.

