

For Immediate Release
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Canadian securities regulators use videos to raise awareness about client reporting requirements

Vancouver – As part of October’s Investor Education month, the Canadian Securities Administrators (CSA) is promoting [four videos](#) to raise awareness of changes to how advisers must report to their clients on the costs, performance, and value of their investments.

The changes to reporting requirements are part of an initiative called the Client Relationship Model Phase 2 (CRM2). Under these new requirements, advisers must provide investors with:

- enhanced relationship disclosure information,
- pre-trade disclosure of adviser fees and other charges,
- expanded account statements,
- annual reports on investment performance, and
- annual reports on charges and compensation.

“It’s important investors understand these new requirements under CRM2,” said Louis Morisset, Chair of the CSA and President and CEO of the Autorité des marchés financiers. “CRM2 will improve adviser-client relationships through increased transparency on investment costs and performance, leading to better, more informed investment decisions. These videos present some of the basics of CRM2 in a straightforward and accessible manner, which should help build much-needed awareness.”

Investors are encouraged to visit securities-administrators.ca for more information and resources on understanding investments and recognizing fraud. The CSA will also be promoting the videos through its Twitter account [@CSA_News](https://twitter.com/CSA_News) throughout the rest of Investor Education Month.

The CSA, the council of the securities regulators of Canada’s provinces and territories, coordinates and harmonizes regulation for the Canadian capital markets.

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