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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 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.

Source URL: bulletin@globalpacific.com/bulletins/advocis/2022-10-21/total-cost-reporting-%E2%80%93-what-you-need-to-know

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