

CPP is unique in that compensation is generated out of two separate systems: CPP Portal for FYC and renewal commissions and WealthServ for bonus. With two systems generating compensation, separate deposits are made to the advisor's bank account with different codes used. They are as follows:

#### TPA/FLIC

This is FYC and/or renewal commissions whose statements are viewable in the [CPP Portal](#)

#### CDNPROTECTIONPAY

This is CPP Bonus, which is viewed on the WealthServ system (where you also see policy details)

#### CPP Portal - <https://portal.cppadvisor.com/login>

This system is only used for the commission statements (**FYC and renewal commissions**).

Username and access is emailed by CPP directly to the advisor shortly after the contract has been approved.

#### WealthServ - <https://ins.wealthserv.com>

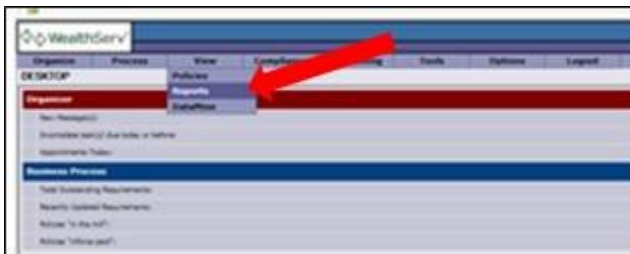
You log into WealthServ to view your policies and access your Bonus Commission paid reports.

**The PIN for CPP WealthServ is 2416.**



The screenshot shows the WealthServ Insurance Backoffice login page. At the top, it says "WealthServ Insurance Backoffice". Below that, it displays "PIN: 2416". There are two input fields: one for a username (indicated by a person icon) and one for a password (indicated by a lock icon). A green "LOGIN" button is at the bottom.

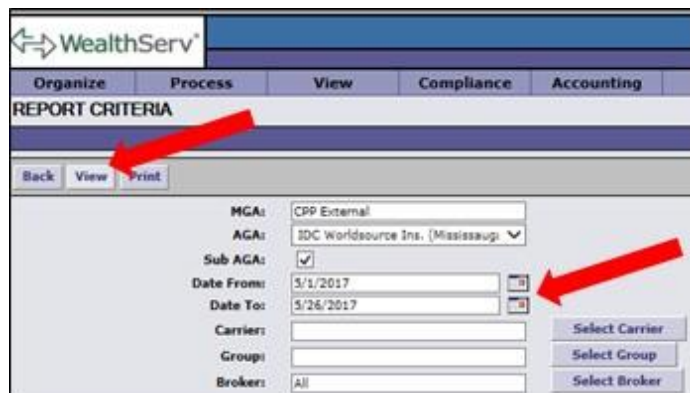
Select **View** from the top menu and then select **Reports**



The advisor name should appear automatically (the screenshots here are from MGA view.)

Select the start and end dates you wish to see and then select **View**.

The report will appear in a new tab.



The screenshot shows the "REPORT CRITERIA" screen in the WealthServ system. It has tabs for "Organize", "Process", "View", "Compliance", and "Accounting". The "View" tab is selected. Below the tabs, there are buttons for "Back", "View", and "Print". The "View" button is highlighted with a red arrow. Below the buttons, there are input fields for "MGA:", "AGA:", "Sub AGA:", "Date From:", "Date To:", "Carriers:", "Group:", and "Brokers:". The "Date From" and "Date To" fields are highlighted with a red arrow. To the right of these fields are buttons for "Select Carrier", "Select Group", and "Select Broker".

If the report appears as follows, no bonus commissions were generated during the time specified.  
Close the tab and expand the date parameters.

Date	Carrier	Plan Name	Policy Number	Insured	Base	Split	Trans Type	Rate	Carrier Pd	MGA Pd	Payment	Balance
Opening Balance:												\$0.00
Closing Balance:												\$0.00

Referring to the sample report below.

To view page two (as there is no closing balance, there must be) select the gold coloured arrow to move forward page by page or click the yellow arrow with the bar, which will take you to the end of the report.

<div> </div> <div> <div>Advisor name</div> <div>c/o IDC Worldsource Ins. (Markham)</div> <div>Markham, ON, L3R 9R9</div> </div>												
BROKER PAID COMPENSATION REPORT												
May 10, 2017 - May 26, 2017												
Date	Carrier	Plan Name	Policy Number	Insured	Base	Split	Trans Type	Rate	Carrier Pd	MGA Pd	Payment	Balance
Advisor name + code											Opening Balance:	\$0.00
12-May-17	Canada Protection Plan	2016 CPP Simplified Elite 20 Year Term	Policy number client name		\$925.68	100.00	FYC	40.00	\$370.26	\$0.00	\$0.00	\$0.00
12-May-17	Canada Protection Plan	2016 CPP Simplified Elite 20 Year Term	Policy number client name		\$598.95	100.00	FYC	40.00	\$239.58	\$0.00	\$0.00	\$0.00
12-May-17	Canada Protection Plan	2016 CPP Simplified Elite 20 Year Term	Policy number client name		\$370.26	0.00	FYO	150.00	\$0.00	\$555.39	\$0.00	\$555.39
12-May-17	Canada Protection Plan	2016 CPP Simplified Elite 20 Year Term	Policy number client name		\$239.58	0.00	FYO	150.00	\$0.00	\$359.37	\$0.00	\$914.76
12-May-17	Canada Protection Plan	2016 CPP Simplified Elite 20 Year Term	Policy number client name		\$0.00	0.00		0.00	\$0.00	\$0.00	(\$914.76)	\$0.00
16-May-17	Canada Protection Plan	2016 CPP Simplified Elite 20 Year Term	Policy number client name		(\$925.68)	100.00	FYC	40.00	(\$370.26)	\$0.00	\$0.00	\$0.00
16-May-17	Canada Protection Plan	2016 CPP Simplified Elite 20 Year Term	Policy number client name		(\$598.95)	100.00	FYC	40.00	(\$239.58)	\$0.00	\$0.00	\$0.00
16-May-17	Canada Protection Plan	2016 CPP Simplified Elite 20 Year Term	Policy number client name		(\$239.58)	0.00	FYO	150.00	\$0.00	(\$359.37)	\$0.00	(\$359.37)
16-May-17	Canada Protection Plan	2016 CPP Simplified Elite 20 Year Term	Policy number client name		(\$370.26)	0.00	FYO	150.00	\$0.00	(\$555.39)	\$0.00	(\$914.76)
<div> Friday, May 26, 2017 10:42:57AM BROKER PAID COMPENSATION REPORT 24/28 1 </div>												

To save the commission report, select the envelope icon and a new small window will open  
From the dropdown menu **Formats** select Acrobat Format (PDF) and also select the tick box for **All** and press **OK**

Export Options

Please select an Export format from the list.

☐ All
☒ Pages

From: 1 To: 1

OK

Formats

Crystal Reports (RPT)  
Acrobat Format (PDF)  
MS Word  
MS Excel 97-2000  
MS Excel 97-2000 (Data only)  
Rich Text Format

A dialogue box will open at the bottom of the page where you may choose to open or save the pdf file.

