



## Submitting Business

All mutual and segregated fund trades and supporting documents must be submitted directly to WFG DC for processing. Prior to submitting documents, you should ensure everything is fully completed, and in good order.

Please see the below methods for submitting business to WFG Dealer Connect. Remember to help avoid duplication do not send trades by fax and by courier. Trades should only be submitted once.

- ***Redemptions and switches - Fax them to 1-800-922-7740 with the Wire Order request form***
- ***Purchases (with Cheques attached) and transfers – Submit originals by courier***

Currently there is no email address for trades as it is an unsecure form of submitting documents. Ensure that when submitting redemption and switch trades use the fax number above.

For trade follow up or any Client Service questions:

- ***Call us at 1 877 599 3432 or local 905 479 3907***
- ***please email your inquiries to [service@wfgdc.com](mailto:service@wfgdc.com) (This should only be used for inquires not for trades)***

For referral documents that need to be added to filing:

- ***Email them to [referrals@wfgdc.com](mailto:referrals@wfgdc.com) with the referral cover sheet (One email per client)***

### **Questions:**

Any questions or comments please direct them to the WFG Dealer Connect at 905-479-3907/1-877-59WFGDC (599-3432), or by email to [service@wfgdc.com](mailto:service@wfgdc.com)

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