

Contact Roles and Descriptions



Alternate Billing Contact – This individual is able to view monthly electronic invoices from Fundserv.

BCP and DR Testing – This individual would be the main contact for all Fundserv Business Continuity exercises and/or disaster recovery tests. They would notify all appropriate parties within their organization of all related BCP/DR test activity. Where appropriate, they would be responsible for both ensuring their company's participation in the exercises and tests and for providing feedback to Fundserv.

Billing Contact – This individual would receive monthly electronic invoices from Fundserv.

Business Operations Contact – Fundserv would notify this individual of any customer-related changes to the Fundserv Network, Standards, hours of operation, and application downtimes.

CIO – This individual oversees the technology footprint of your organization.

Communications Contact – This individual is the person who would help amplify industry messaging within your firm.

Cybersecurity Contact – This individual is responsible for your firm's cybersecurity strategy.

Emergency Contact – This individual would be contacted for major system or industry disruptions and would be responsible for notifying the appropriate people within your company. This would include any after-hours communications.

Exempt Product Senior Contact – This individual oversees the processing of exempt products at your firm if you process them.

GIC Senior Contact – This individual oversees the processing of GICs at your firm if you process them.

IT Operations Contact – This individual is responsible for network connections, testing, error notifications, and certificate expiry notifications. The expectation is that this contact would notify the appropriate parties within your company to ensure resolution of any issues.

Linked Note Senior Contact – This individual oversees the processing of linked notes at your firm if you process them.

LRA (Local Registration Authority) – This individual registers employees and manages user access to Fundserv services.

N\$M Banking Contact – This individual is the secondary contact for the daily money movement to and from Fundserv.

N\$M Missing Payment Escalation Contact – This individual is responsible for any payment settlement issue(s) for the daily money movement to and from Fundserv.

N\$M Testing Contact – This Individual is responsible for N\$M banking test setup for any additions/changes on the N\$M account.

Primary N\$M Banking Contact – This individual is responsible for the daily money movement to and from Fundserv.

Privacy Breach Contact – This individual is who needs to be made aware of a privacy breach by a counterparty who is a Fundserv member or service provider.

Senior Contact – This individual would be the escalation point for any Fundserv matters. They would also receive high-level information and distributions. The Senior Contact would be responsible for resolution of escalated items.

Senior Executive – The President, CEO, or other Senior Executive of the company.

Signing Officer – This individual would be responsible for any maintenance to the Fundserv Customer Contract and other legal documentation.

Social Media Accounts – If you provide us with your corporate accounts on the main social media services (Twitter, LinkedIn, Facebook, Instagram), we may be able to help amplify your posts related to things such as charitable initiatives, etc.

Standards Adherence Contact (Manufacturer only) – This individual would be notified if your company has any outstanding mandatory adherence issues as per the Standards Helpfile and would receive monthly audit reports and notification of any penalties.