

Individual Pension Plan (IPP)  
Confidential Questionnaire



Building **your** future

**ADVISOR INFORMATION** (we will send the IPP Illustration to your email address)

NAME	COMPANY
TELEPHONE	EMAIL

**SPONSORING COMPANY INFORMATION**

NAME OF SPONSORING COMPANY

DATE OF INCORPORATION (DD/MM/YY)      CORPORATE YEAR END (DD/MM)

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**PLAN MEMBER**

**MEMBER SPOUSE** (IF EMPLOYED BY COMPANY)

FULL NAME	FULL NAME
GENDER <input type="radio"/> MALE      FEMALE	GENDER <input type="radio"/> MALE      FEMALE
DATE OF BIRTH DD / MM / YYYY /  /	DATE OF BIRTH DD / MM / YYYY /  /
DATE OF HIRE DD / MM / YYYY /  /	DATE OF HIRE DD / MM / YYYY /  /
PROVINCE OF RESIDENCE	PROVINCE OF RESIDENCE

# Individual Pension Plan (IPP) Confidential Questionnaire

## T4 INCOME FROM SPONSORING COMPANY (DO NOT INCLUDE DIVIDENDS OR OTHER INCOME)

PLAN MEMBER		MEMBER SPOUSE (IF EMPLOYED BY COMPANY)	
2021 _____	2005 _____	2021 _____	2005 _____
2020 _____	2004 _____	2020 _____	2004 _____
2019 _____	2003 _____	2019 _____	2003 _____
2018 _____	2002 _____	2018 _____	2002 _____
2017 _____	2001 _____	2017 _____	2001 _____
2016 _____	2000 _____	2016 _____	2000 _____
2015 _____	1999 _____	2015 _____	1999 _____
2014 _____	1998 _____	2014 _____	1998 _____
2013 _____	1997 _____	2013 _____	1997 _____
2012 _____	1996 _____	2012 _____	1996 _____
2011 _____	1995 _____	2011 _____	1995 _____
2010 _____	1994 _____	2010 _____	1994 _____
2009 _____	1993 _____	2009 _____	1993 _____
2008 _____	1992 _____	2008 _____	1992 _____
2007 _____	1991 _____	2007 _____	1991 _____
2006 _____		2006 _____	

### RRSP Information Required

CURRENT MARKET VALUE OF RRSP

\$ \_\_\_\_\_

\*UNUSED RRSP DEDUCTION ROOM AS OF 12/31/2020

\$ \_\_\_\_\_

CURRENT MARKET VALUE OF RRSP

\$ \_\_\_\_\_

\*UNUSED RRSP DEDUCTION ROOM AS OF 12/31/2020

\$ \_\_\_\_\_

\* Do not include current year's unused room. Do not make RRSP contributions in the year an IPP is set up.

Is the member a Connected Person? (Owns or is married to shareholder with 10% or more of Company's shares) YES NO

Is the Participant a member of another Registered Pension Plan? YES NO

Will any additional related corporations be contributing to the pension plan? YES NO



Building your future

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