

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/MMM/YY) CORPORATE YEAR END (DD/MMM)

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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 / MMM / YYYY / /	DATE OF BIRTH DD / MMM / YYYY / /
DATE OF HIRE DD / MMM / YYYY / /	DATE OF HIRE DD / MMM / YYYY / /
PROVINCE OF RESIDENCE	PROVINCE OF RESIDENCE

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

PLAN MEMBER		MEMBER SPOUSE (IF EMPLOYED BY COMPANY)	
2023	2006	2023	2006
_____	_____	_____	_____
2022	2005	2022	2005
_____	_____	_____	_____
2021	2004	2021	2004
_____	_____	_____	_____
2020	2003	2020	2003
_____	_____	_____	_____
2019	2002	2019	2002
_____	_____	_____	_____
2018	2001	2018	2001
_____	_____	_____	_____
2017	2000	2017	2000
_____	_____	_____	_____
2016	1999	2016	1999
_____	_____	_____	_____
2015	1998	2015	1998
_____	_____	_____	_____
2014	1997	2014	1997
_____	_____	_____	_____
2013	1996	2013	1996
_____	_____	_____	_____
2012	1995	2012	1995
_____	_____	_____	_____
2011	1994	2011	1994
_____	_____	_____	_____
2010	1993	2010	1993
_____	_____	_____	_____
2009	1992	2009	1992
_____	_____	_____	_____
2008	1991	2008	1991
_____	_____	_____	_____
2007		2007	
_____		_____	

RRSP Information Required

CURRENT MARKET VALUE OF RRSP

\$ _____

*UNUSED RRSP DEDUCTION ROOM AS OF 12/31/2022

\$ _____

CURRENT MARKET VALUE OF RRSP

\$ _____

*UNUSED RRSP DEDUCTION ROOM AS OF 12/31/2022

\$ _____

* 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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