

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)	
2025		2025	
2024	2007	2024	2007
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

**RRSP Information Required**

CURRENT MARKET VALUE OF RRSP

\$

\*UNUSED RRSP DEDUCTION ROOM AS OF 12/31/2024

\$

CURRENT MARKET VALUE OF RRSP

\$

\*UNUSED RRSP DEDUCTION ROOM AS OF 12/31/2024

\$

\* 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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