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Notice to Ontario Individual Pension Plan Sponsors

Please review the following important information regarding the annual IPP government reporting as at December 31, 2015.

2015 Pension Adjustments:

The Employer is required to report a Pension Adjustment and the IPP registration number on each active plan member's 2015 T4 Slip. Reported pension adjustments are used by CRA to adjust personal RSP room and are not equal to the annual IPP contribution. Employer IPP contributions are not reported on the plan member's T4 slip. GBL will calculate and confirm the IPP information to be included on the plan member's T4 slip.

To obtain 2015 pension adjustment information prior to the corporate *T4 filing deadline of February 28, 2016* forward each active member's total employment income to our office by email or fax, complete and return the enclosed Pension Adjustment Information form, or use our online Pension Adjustment Calculator at www.gblinc.ca

Please ensure the individual or company that completes the corporate T4 filings is aware of this requirement.

2015 Annual Filings:

GBL will complete and submit the following required Provincial and Federal government filings on behalf of the IPP:

- FSCO Form 7 – Summary of Contributions
- T3P Employee's Pension Plan Income Tax Return
- Pension Fund Financial Statement
- Joint CRA/FSCO Annual Information Return

Electronic submission via the FSCO Pension Services Portal (PSP) is mandatory. Plan Administrators are required to activate the online PSP account and delegate GBL as the Agent and/or Actuary.

Copies of all completed forms and statements will be provided for your records.

GBL will contact the Plan Financial Advisor to obtain information regarding the Plan's investment account. Please notify our office if you have recently changed advisors or if there have been multiple accounts opened on behalf of the Plan.

FSCO Assessment Invoice:

The Employer will receive an FSCO Assessment Notice and Invoice from the Financial Services Commission of Ontario (FSCO) in February. Payment to FSCO is required within 30 days of the date of the assessment notice. Further information can be obtained from FSCO: 1-800-668-0128 or www.fSCO.gov.ca

For additional information regarding the IPP annual reporting, please visit our website: www.gblinc.ca or contact our office by phone Toll Free 877-249-2999 or email: admin@gblinc.ca