

# Retirement Compensation Arrangement (RCA) Confidential Questionnaire



Building *your* future

## ADVISOR INFORMATION

NAME \_\_\_\_\_ COMPANY \_\_\_\_\_

TELEPHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

## SPONSORING COMPANY INFORMATION

NAME OF SPONSORING COMPANY \_\_\_\_\_

DATE OF INCORPORATION (DD/MMM/YY) \_\_\_\_\_ CORPORATE YEAR END (DD/MMM) \_\_\_\_\_

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

## PLAN MEMBER

## MEMBER SPOUSE (IF EMPLOYED BY THE COMPANY)

FULL NAME \_\_\_\_\_ FULL NAME \_\_\_\_\_

GENDER  MALE  FEMALE

GENDER  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 \_\_\_\_\_

BEST THREE YEARS T4/T4PS EARNINGS (DO NOT INCLUDE DIVIDENDS OR OTHER INCOME)

YEAR \$ YEAR \$

YEAR \$ YEAR \$

YEAR \$ YEAR \$

Is the RCA Established pursuant to a Severance YES NO

EXPECTED AGE OF RETIREMENT FOR PARTICIPANTS \_\_\_\_\_, OR EXPECTED DATE OF RETIREMENT FOR PARTICIPANTS \_\_\_\_\_

Has the member ever been a participant of any other pension plan or, deferred profit sharing plan? YES NO

If YES, type of plan: \_\_\_\_\_

Date of entry into Plan: \_\_\_\_\_



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