

Individual Pension Plan (IPP) Confidential Questionnaire

ADVISOR INFORMATION

Advisor Province

Ontario

Name

Company

Telephone

Email

SPONSORING COMPANY INFORMATION

Name of Sponsoring Company

Date of Incorporation

Corporate Year End

0 of 50 max character

Submitted as DD/MM/YYYY.

PLAN MEMBER

Plan Member Name

Plan Member Gender Male Female

Plan Member Date of Birth:

Plan Member Date of Hire

Plan Member Province of Residence

--

T4 INCOME FROM SPONSORING COMPANY

2022 (Estimate)

2021

2020

2019

2018

RRSP INFORMATION REQUIRED

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

CURRENT MARKET VALUE OF RRSP

*UNUSED RRSP DEDUCTION ROOM AS OF 12/31/2021

Is the member a Connected Person? (Owns or is married to shareholder with 10% or more of Company's shares)

Yes No

Yes No

Is the Participant a member of another Registered Pension Plan?

Yes No

Yes No

Will any additional related corporations be contributing to the pension plan?

Yes No

Yes No

SUBMIT