

Personal Pension Plan (PPP) 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 Plan Member Date of Birth:

Male Female

Plan Member Date of Hire

Plan Member Province of Residence

T4 INCOME FROM SPONSORING COMPANY

(DO NOT INCLUDE DIVIDENDS OR OTHER INCOME)

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

Date:

Place: