

2019 Individual Pension Plan Data Form

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Advisor Information

Name:	
Company:	
Telephone:	
E-mail:	

Corporate Information

Company:	
Address:	
Telephone:	
Fax:	
E-mail:	
Fiscal year end:	
Are you a "connected person"?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are or were you a member of a Company sponsored pension or deferred profit sharing plan?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Please refer to the page 2 for instructions.

Prospective Member Information

Name:	
Gender:	
Birth date:	
Employment date:	
Year	T4 Earnings
1991	
1992	
1993	
1994	
1995	
1996	
1997	
1998	
1999	
2000	
2001	
2002	
2003	
2004	
2005	
2006	
2007	
2008	
2009	
2010	
2011	
2012	
2013	
2014	
2015	
2016	
2017	
2018	
2019 (Estimated)	
RRSP market value:	
RRSP unused room:	
RRSP over contribution:	
2019 RRSP contribution?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Spouse Information

Name:	
Gender:	
Birth date:	
Employment date:	
Year	T4 Earnings
1991	
1992	
1993	
1994	
1995	
1996	
1997	
1998	
1999	
2000	
2001	
2002	
2003	
2004	
2005	
2006	
2007	
2008	
2009	
2010	
2011	
2012	
2013	
2014	
2015	
2016	
2017	
2018	
2019 (Estimated)	
RRSP market value:	
RRSP unused room:	
RRSP over contribution:	
2019 RRSP contribution?	Yes <input type="checkbox"/> No <input type="checkbox"/>

The Individual Pension Plan

An Individual Pension Plan (“IPP”) is an employer sponsored defined benefit pension plan.

The object of the IPP is to fund the maximum lifetime pension benefit permitted under the *Income Tax Act* (Canada).

The IPP is an excellent tool for the executive, incorporated professional or small business owner who wants more retirement savings than is available through an RRSP.

Completing the IPP Data Form

Finding out how much you can benefit from an IPP will require accurate data. Outlined below is an explanation of the terms and requirements.

Should you have any questions, or require additional information, please contact our office.

Corporate Information

Connected person – an individual is a connected person if he/she owns, directly or indirectly, more than 10% of any class of shares of the Company, including any related company.

Participation in a registered pension plan or deferred profit sharing plan – an individual cannot accrue benefits under multiple pension plans of the same or a related employer for overlapping time periods. Confirm your participation by checking either “Yes” or “No”.

Prospective Member Information

T4 Earnings – an individual must have T4 earnings in order to participate in an IPP. Where T4 earnings for any year exceed \$151,278, you may enter “Max”. Include only T4 income received from the sponsoring Company.

RRSP market value – enter the RRSP current market value. Please contact our office if this information is not available.

RRSP unused room – enter the amount of unused RRSP room at December 31, 2018 as stated on the Notice of Assessment from the Canada Revenue Agency. **Do not include 2019 RRSP contribution room.**

RRSP over contribution – enter the amount of RRSP over contribution at December 31, 2018 as stated on the Notice of Assessment from the Canada Revenue Agency.

2019 RRSP contribution – indicate whether a contribution has been made for 2019 by checking either “Yes” or “No”.

Spouse Information

This section should only be completed if the spouse is employed by the same or a related employer.

T4 Earnings – an individual must have T4 earnings in order to participate in an IPP. Where T4 earnings for any year exceed \$151,278, you may enter “Max”. Include only T4 income received from the sponsoring Company.

RRSP market value – enter the RRSP current market value. Please contact our office if this information is not available.

RRSP unused room – enter the amount of unused RRSP room at December 31, 2018 as stated on the Notice of Assessment from the Canada Revenue Agency. **Do not include 2019 RRSP contribution room.**

RRSP over contribution – enter the amount of RRSP over contribution at December 31, 2018 as stated on the Notice of Assessment from the Canada Revenue Agency.

2019 RRSP contribution – indicate whether a contribution has been made for 2019 by checking either “Yes” or “No”.

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