



2020 Individual Pension Plan (IPP) Data Form

Advisor Information

Name: _____ Company: _____
 E-mail: _____ Phone: _____

Corporate Information

Company Name: _____
 Date of Incorporation: _____ Fiscal Year-End: _____

Member(s) Information

Primary Member	Spouse (if participating)
Name: _____	Name: _____
Date of Birth: _____	Date of Birth: _____
Date of Hire: _____	Date of Hire: _____
RRSP Balance: _____	RRSP Balance: _____
Unused RRSP Deduction Room: _____	Unused RRSP Deduction Room: _____
“Connected” person? Yes <input type="checkbox"/> No <input type="checkbox"/>	“Connected” person? Yes <input type="checkbox"/> No <input type="checkbox"/>
Are or were you a Member of an existing RPP or DPSP? Yes <input type="checkbox"/> No <input type="checkbox"/>	Are or were you a Member of an existing RPP or DPSP? Yes <input type="checkbox"/> No <input type="checkbox"/>
2020 RRSP Contribution: _____	2020 RRSP Contribution: _____

T4 Earnings

Primary Member		Spouse (if participating)	
1991 _____	2006 _____	1991 _____	2006 _____
1992 _____	2007 _____	1992 _____	2007 _____
1993 _____	2008 _____	1993 _____	2008 _____
1994 _____	2009 _____	1994 _____	2009 _____
1995 _____	2010 _____	1995 _____	2010 _____
1996 _____	2011 _____	1996 _____	2011 _____
1997 _____	2012 _____	1997 _____	2012 _____
1998 _____	2013 _____	1998 _____	2013 _____
1999 _____	2014 _____	1999 _____	2014 _____
2000 _____	2015 _____	2000 _____	2015 _____
2001 _____	2016 _____	2001 _____	2016 _____
2002 _____	2017 _____	2002 _____	2017 _____
2003 _____	2018 _____	2003 _____	2018 _____
2004 _____	2019 _____	2004 _____	2019 _____
2005 _____	2020 _____	2005 _____	2020 _____
<i>(Estimated)</i>		<i>(Estimated)</i>	

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 F: (403) 245-4229
 E: info@LMCGroup.ca

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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 \$154,611, 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, 2019 as stated on the Notice of Assessment from the Canada Revenue Agency. **Do not include 2020 RRSP contribution room.**

RRSP over contribution – enter the amount of RRSP over contribution at December 31, 2019 as stated on the Notice of Assessment from the Canada Revenue Agency.

2020 RRSP contribution – indicate whether a contribution has been made for 2020 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 \$154,611, 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, 2019 as stated on the Notice of Assessment from the Canada Revenue Agency. **Do not include 2020 RRSP contribution room.**

RRSP over contribution – enter the amount of RRSP over contribution at December 31, 2019 as stated on the Notice of Assessment from the Canada Revenue Agency.

2020 RRSP contribution – indicate whether a contribution has been made for 2020 by checking either “Yes” or “No”.

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