



Individual Pension Plan Auxiliary Data Form

- IPP Implementation Steps: 1. Complete the Auxiliary Data Form
2. Submit to LMC Group with each plan member's **Notice of Assessment**

Corporate Information

Legal Name of Corporation: _____

Mailing Address: _____

Business No.: _____

Nature of Business: _____

Signing Authority Name & Title: _____

Telephone No.: _____ Fax No.: _____

Date of incorporation: _____ Year End: _____

Will any additional companies contribute to the IPP? Yes No

Plan Member Information

Name: _____ Date of Birth: _____

SIN: _____ Date of Hire: _____

Mailing Address: _____

Email Address: _____

Current market value of RRSP and Date: _____

RRSP contributions made in the current year: _____

Plan Member Information (Spouse if Participating)

Name: _____ Date of Birth: _____

SIN: _____ Date of Hire: _____

Mailing Address: _____

Email Address: _____

Current market value of RRSP and Date: _____

RRSP contributions made in the current year: _____



Trustee Information

Trustee 1 Name: _____

Mailing Address: _____

Trustee 2 Name: _____

Mailing Address: _____

Trustee 3 Name: _____

Mailing Address: _____

Investment Advisor Information

Name: _____ Email: _____

Company Name: _____

Mailing Address: _____

Telephone No.: _____ Fax No.: _____

Accountant Information

Name: _____ Email _____

Company Name: _____

Mailing Address: _____

Telephone No.: _____

Please courier the documents for signature to: (select one) Client Advisor Accountant

I, _____, hereby certify that I wish to proceed with the implementation of the IPP, agree to the terms & conditions outlined below, and will be responsible for payment for the implementation fee of \$2,500.00 and the annual administration fee of \$1,725.00 (1 member IPP) \$1,850.00 (2 member IPP) plus applicable taxes and any provincial filing fee due upon signing of documentation.

Signature

Date

Terms & Conditions:

1. We reserve the right to increase our fees in the future to reflect inflation.
2. Provincial registration fees, applicable in Saskatchewan, Ontario, Nova Scotia, Newfoundland, New Brunswick, and Federally Regulated (OSFI) plans will be added to our invoice.
3. LMC Group reserves the right to invoice on a fee for service basis for revised documentation/filings required due to misinformation.
4. The setup of an IPP is subject to the Income Tax Act and Regulations, which can change. The calculation of the minimum and maximum tax-deductible contributions provided in this report are subject to the data provided by the prospective IPP member and, if applicable, the spouse.
Illustrations of IPP balances are subject to investment performance and are not guaranteed.