



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"/>
Member of an existing RPP? Yes <input type="checkbox"/> No <input type="checkbox"/>	Member of an existing RPP? Yes <input type="checkbox"/> No <input type="checkbox"/>
2023 RRSP Contribution: _____	2023 RRSP Contribution: _____

T4 Earnings

Primary Member			Spouse (if participating)		
1991	2008	_____	1991	2008	_____
1992	2009	_____	1992	2009	_____
1993	2010	_____	1993	2010	_____
1994	2011	_____	1994	2011	_____
1995	2012	_____	1995	2012	_____
1996	2013	_____	1996	2013	_____
1997	2014	_____	1997	2014	_____
1998	2015	_____	1998	2015	_____
1999	2016	_____	1999	2016	_____
2000	2017	_____	2000	2017	_____
2001	2018	_____	2001	2018	_____
2002	2019	_____	2002	2019	_____
2003	2020	_____	2003	2020	_____
2004	2021	_____	2004	2021	_____
2005	2022	_____	2005	2022	_____
2006	2023	_____	2006	2023	_____
2007		_____	2007		_____

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 \$175,334, 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, 2022 as stated on the Notice of Assessment from the Canada Revenue Agency. **Do not include 2023 RRSP contribution room.**

RRSP over contribution – enter the amount of RRSP over contribution at December 31, 2022 as stated on the Notice of Assessment from the Canada Revenue Agency.

2023 RRSP contribution – indicate whether a contribution has been made for 2023 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 \$175,334, 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, 2022 as stated on the Notice of Assessment from the Canada Revenue Agency. **Do not include 2023 RRSP contribution room.**

RRSP over contribution – enter the amount of RRSP over contribution at December 31, 2022 as stated on the Notice of Assessment from the Canada Revenue Agency.

2023 RRSP contribution – indicate whether a contribution has been made for 2023 by checking either “Yes” or “No”.

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