

# Individual Pension Plan (IPP) Confidential Questionnaire



Building **your** future

## YOUR INFORMATION (we will send the IPP Illustration to your email address)

NAME	COMPANY
TELEPHONE	EMAIL
FAX	YOUR GBL CONSULTANT

## SPONSORING COMPANY INFORMATION

NAME OF SPONSORING COMPANY	
DATE OF INCORPORATION (DD/MM/YY)	CORPORATE YEAR END (DD/MM)

## PLAN MEMBER

## MEMBER SPOUSE (IF PARTICIPATING)

FULL NAME	FULL NAME
GENDER <input type="radio"/> MALE <input type="radio"/> FEMALE	GENDER <input type="radio"/> MALE <input type="radio"/> FEMALE
DATE OF BIRTH DD / MM / YYYY / /	DATE OF BIRTH DD / MM / YYYY / /
DATE OF HIRE DD / MM / YYYY / /	DATE OF HIRE DD / MM / YYYY / /
PROVINCE OF RESIDENCE	PROVINCE OF RESIDENCE

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## T4 INCOME FROM SPONSORING COMPANY

PLAN MEMBER		MEMBER SPOUSE (IF PARTICIPATING)	
2018 _____	2004 _____	2018 _____	2004 _____
2017 _____	2003 _____	2017 _____	2003 _____
2016 _____	2002 _____	2016 _____	2002 _____
2015 _____	2001 _____	2015 _____	2001 _____
2014 _____	2000 _____	2014 _____	2000 _____
2013 _____	1999 _____	2013 _____	1999 _____
2012 _____	1998 _____	2012 _____	1998 _____
2011 _____	1997 _____	2011 _____	1997 _____
2010 _____	1996 _____	2010 _____	1996 _____
2009 _____	1995 _____	2009 _____	1995 _____
2008 _____	1994 _____	2008 _____	1994 _____
2007 _____	1993 _____	2007 _____	1993 _____
2006 _____	1992 _____	2006 _____	1992 _____
2005 _____	1991 _____	2005 _____	1991 _____

## RRSP Information Required

CURRENT RRSP BALANCE	CURRENT RRSP BALANCE
\$ _____	\$ _____
*UNUSED RRSP DEDUCTION ROOM AS OF 12/31/2017	*UNUSED RRSP DEDUCTION ROOM AS OF 12/31/2017
\$ _____	\$ _____

\* Do not include current year's unused room. Do not make RRSP contributions in the year an IPP is set up.

Is the member a Connected Person? (Owns or is married to shareholder with 10% or more of Company's shares)	YES	NO
Is the Participant a member of another Registered Pension Plan?	YES	NO
Will any additional related corporations be contributing to the pension plan?	YES	NO



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5720-4th Street SE, Suite 130  
Calgary, Alberta T2H 1K7  
Toll Free: (877) 249-2999  
Phone: (403) 249-1820  
Email info@gbllnc.ca

121 Richmond St West, Suite 503  
Toronto, Ontario M5H 2K1  
Toll Free: (888) 941-9829  
Phone: (416) 941-9829  
www.gbllnc.ca