



**Individual Pension Plan - Information Sheet**

**The following information is provided in strict confidence to TT Actuarial Inc. for the purpose of assessing the feasibility of establishing an Individual Pension Plan.**

Name of Proposed Plan Member:

\_\_\_\_\_

Gender of Proposed Plan Member:

\_\_\_\_\_

Name of Sponsoring Company:

\_\_\_\_\_

Member Date of Birth (DD/MM/YYYY):

\_\_\_\_\_

Spouse Date of Birth (DD/MM/YYYY):

\_\_\_\_\_

Date of Hire (DD/MM/YYYY):

\_\_\_\_\_

RRSP/LIRA Fund Amount (as at 31-Dec-2022):

\$

\_\_\_\_\_

RRSP Deduction Limit for 2022:

\$

\_\_\_\_\_

RRSP Contributions made for 2022:

\$

\_\_\_\_\_

**Compensation <sup>(1)</sup> History and Connected Person Status**

Please write the plan member's compensation for each of the years and indicate by a "C" each year the member was a Connected Person (i.e. a person who, together with other non-arm's length persons, owns at least 10% of the employer's shares, or a person who does not deal at arm's length with the Company).

1991: _____	2002: _____	2013: _____
1992: _____	2003: _____	2014: _____
1993: _____	2004: _____	2015: _____
1994: _____	2005: _____	2016: _____
1995: _____	2006: _____	2017: _____
1996: _____	2007: _____	2018: _____
1997: _____	2008: _____	2019: _____
1998: _____	2009: _____	2020: _____
1999: _____	2010: _____	2021: _____
2000: _____	2011: _____	2022: _____
2001: _____	2012: _____	

(1) Compensation according to Section 147.1(1) of the Income Tax Act can be summarized as income in respect of employment with the employer or from an office remunerated by the employer that is required under Sections 5 and 6 to be included in the individual's income (usually T4 employment earnings or T4PS employee profit sharing payments)

**I understand the above information will be used solely for the purpose of creating a projection showing the advantages of Individual Pension Plans.**

\_\_\_\_\_  
Name and Company

\_\_\_\_\_  
Date