



Individual Pension Plan (IPP)

Information on the corporation

Name of the company: _____ Address: _____

Date of incorporation: _____ Date of fiscal year end: _____

Information on the owner/executive/professional

Name of participant: _____ Gender: _____

Date of birth: _____ Date of employment with the company: _____

Year	T4 employment earnings (Box14) from the company	Year	T4 employment earnings (Box14) from the company	Year	T4 employment earnings (Box14) from the company
1991		2003		2015	
1992		2004		2016	
1993		2005		2017	
1994		2006		2018	
1995		2007		2019	
1996		2008		2020	
1997		2009		2021	
1998		2010		2022	
1999		2011		2023	
2000		2012		2024	
2001		2013		2025	
2002		2014			

Unused RRSP deduction room at
fiscal yearend 2025: _____

RRSP contributions already made in
2026 not deducted for 2025: _____

Information on the spouse (if applicable and if the spouse is employed by the company)

Name of spouse: _____ Gender: _____

Date of birth: _____ Date of employment with the company: _____

Year	T4 employment earnings (Box14) from the company	Year	T4 employment earnings (Box14) from the company	Year	T4 employment earnings (Box14) from the company
1991		2003		2015	
1992		2004		2016	
1993		2005		2017	
1994		2006		2018	
1995		2007		2019	
1996		2008		2020	
1997		2009		2021	
1998		2010		2022	
1999		2011		2023	
2000		2012		2024	
2001		2013		2025	
2002		2014			

Unused RRSP deduction room at
fiscal yearend 2025: _____

RRSP contributions already made in
2026 not deducted for 2025: _____

General information

1) Does the member hold directly or indirectly (spouse, brother, sister, child, grand-child, father, mother) 10% or more of any class of shares of the company or of a company or a corporation linked to it?

No Yes

2) Does the company contribute or has it contributed to a pension plan or to a deferred profit sharing plan for the member?

No Yes

If yes, for which years? _____

3) Has the member ever participated in a pension plan?

No Yes

If yes, have the pension funds been transferred to the member's RRSPs/LIRAs? No Yes

4) What is the total amount accumulated in RRSPs in the name of the member and in the name of the spouse, if applicable, as at the most recent date?

Member : _____

Spouse : _____

Date : _____

5) What is the total amount accumulated in locked-in retirement accounts (LIRAs) by the member and by the spouse, if applicable, as at the most recent date?

Member : _____

Spouse : _____

Date : _____