



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		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		2023	
Unused RRSP deduction room at fiscal yearend 2023:				RRSP contributions already made in 2024 not deducted for 2023:	

**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		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		2023	
Unused RRSP deduction room at fiscal yearend 2023:				RRSP contributions already made in 2024 not deducted for 2023:	

**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 locked-in retirement accounts (LIRAs) by the member and by the spouse, if applicable, as at the most recent date?

Member : \_\_\_\_\_

Spouse : \_\_\_\_\_

Date : \_\_\_\_\_