

INDIVIDUAL PENSION PLAN (IPP) DATA COLLECTION

Note: the data must be certified by the client before implementing the IPP

INFORMATION ON EMPLOYER

| | | | |
|--------------------|----------------------|---------|----------------------|
| Employer's name | <input type="text"/> | Address | <input type="text"/> |
| Business number | <input type="text"/> | | <input type="text"/> |
| Incorporation date | <input type="text"/> | | <input type="text"/> |
| Telephone number | <input type="text"/> | | <input type="text"/> |
| Fax number | <input type="text"/> | | <input type="text"/> |

INFORMATION ON EMPLOYEE

| | | | |
|-------------------------------|----------------------|---------------------------------|----------------------|
| Name | <input type="text"/> | Sex | <input type="text"/> |
| Social Insurance Number (SIN) | <input type="text"/> | Male | <input type="text"/> |
| Province | <input type="text"/> | Female | <input type="text"/> |
| Date of birth | <input type="text"/> | | |
| Date of employment | <input type="text"/> | Connected Person ⁽¹⁾ | <input type="text"/> |
| 2014 Salary (estimated) | <input type="text"/> | Yes | <input type="text"/> |
| | | No | <input type="text"/> |

DESIGNATED SAVINGS ARRANGEMENTS

RRSP
Accumulated assets as at a recent date (eg. December 31, 2013)

RRSP Contributions for 2014

Unused RRSP room as at December 31, 2013

Only if applicable

Accumulated Locked In RRSP at a recent date

Accumulated Money Purchase Plan Assets at a recent date

(1): A person is connected with the employer if he/she owns 10% or more of the shares of the employer or of a corporation related to the employer or if he/she is related to such person (spouse, brother, sister, child, grand-child, father or mother) as defined under the Income Tax Act.

EMPLOYEE'S SALARY HISTORY (\$)

(Annual Compensation as provided on T4 Form including bonuses and taxable benefits but excluding dividends)

| | | | |
|------|----------------------|------|----------------------|
| 2013 | <input type="text"/> | 1998 | <input type="text"/> |
| 2012 | <input type="text"/> | 1997 | <input type="text"/> |
| 2011 | <input type="text"/> | 1996 | <input type="text"/> |
| 2010 | <input type="text"/> | 1995 | <input type="text"/> |
| 2009 | <input type="text"/> | 1994 | <input type="text"/> |
| 2008 | <input type="text"/> | 1993 | <input type="text"/> |
| 2007 | <input type="text"/> | 1992 | <input type="text"/> |
| 2006 | <input type="text"/> | 1991 | <input type="text"/> |
| 2005 | <input type="text"/> | | |
| 2004 | <input type="text"/> | | |
| 2003 | <input type="text"/> | | |
| 2002 | <input type="text"/> | | |
| 2001 | <input type="text"/> | | |
| 2000 | <input type="text"/> | | |
| 1999 | <input type="text"/> | | |

(Include salaries prior to 1991 if applicable)

DATA CERTIFICATION

Name:

Date:

Signature: