



IPP and PENSION *Wrap*™

(RRSP *Wrap*™ / MPPP *Wrap*™ / IPP *Wrap*™)
Request for Illustration

Client's Personal Information				
Client (Plan Member)	Date of Birth (d/m/y)	Smoking Status <input type="radio"/> Non-Smoker <input type="radio"/> Smoker	Gender <input type="radio"/> Male <input type="radio"/> Female	US Citizen <input type="radio"/> Yes <input type="radio"/> No
Spouse	Date of Birth (d/m/y)	Smoking Status <input type="radio"/> Non-Smoker <input type="radio"/> Smoker	Gender <input type="radio"/> Male <input type="radio"/> Female	US Citizen <input type="radio"/> Yes <input type="radio"/> No

Client's Corporate Information			
Client's Company/Employer	Is Company Incorporated? <input type="radio"/> Yes <input type="radio"/> No	If yes, Corporate Year end (d/m/y)	
Address	City	Province	Postal Code
Shares Owned _____ % By Client _____ % by Spouse	Years of Service in Current Company	Previous Company (if acquired)	

Entitlement Calculation																																																										
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If BONUSSES are included in entitlement calculations, total T4'd earnings <u>CANNOT</u> be reduced in the subsequent year, RCA deposits must be in addition to the T4'd SALARY and BONUS.</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: left; border-bottom: 1px solid black;">PAST EARNINGS</th> <th style="text-align: left; border-bottom: 1px solid black;">T4'd Earnings: \$</th> </tr> <tr> <td style="border-bottom: 1px solid black;">Year: _____</td> <td style="border-bottom: 1px solid black;">_____</td> </tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> <tr><td style="border-bottom: 1px solid black;">_____</td><td style="border-bottom: 1px solid black;">_____</td></tr> </table>	ANNUAL CLIENT COMPENSATION	INCLUDE IN CALCULATION	Current Salary \$	<input type="radio"/> Yes <input type="radio"/> No	Current Bonus \$	<input type="radio"/> Yes <input type="radio"/> No	PAST EARNINGS	T4'd Earnings: \$	Year: _____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	<table style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: left; border-bottom: 1px solid black;">CURRENT PENSION BALANCES</th> </tr> <tr> <td style="border-bottom: 1px solid black;">RRSP \$ _____</td> </tr> <tr> <td style="border-bottom: 1px solid black;">MPPP \$ _____</td> </tr> <tr> <td style="border-bottom: 1px solid black;">Annual IPP Payout \$ _____</td> </tr> <tr> <td style="border-bottom: 1px solid black;">IPP Start Date _____</td> </tr> <tr> <td style="border-bottom: 1px solid black;">Plan member's expected retirement age <i>(Please circle)</i></td> </tr> <tr> <td style="border-bottom: 1px solid black;">69 65 60 55 Other _____</td> </tr> <tr> <td style="border-bottom: 1px solid black;">Salary Index Rate <i>(please circle)</i></td> </tr> <tr> <td style="border-bottom: 1px solid black;">0% 2% 3% 5% Other _____ %</td> </tr> </table>	CURRENT PENSION BALANCES	RRSP \$ _____	MPPP \$ _____	Annual IPP Payout \$ _____	IPP Start Date _____	Plan member's expected retirement age <i>(Please circle)</i>	69 65 60 55 Other _____	Salary Index Rate <i>(please circle)</i>	0% 2% 3% 5% Other _____ %
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Supplementary IPP Questionnaire	
• Are you a connected person*? <input type="radio"/> Yes <input type="radio"/> No	*A connected person is a person who owns, either directly or indirectly, (ie: spouse, sibling, parent) at least 10% of the issued shares of a company or a corporation related to the company, or a person who receives a salary from his Employer 2.5 times higher than the maximum pensionable earnings.
• Is the company controlled by a holding corporation? <input type="radio"/> Yes <input type="radio"/> No	
• How much have you contributed to an RRSP since the beginning of the year? \$ _____	
• Unused RRSP deduction limit at the end of the immediately preceding year? \$ _____	
• Has the company ever contributed to a DPSP (deferred profit sharing plan) on your behalf? <input type="radio"/> Yes, in which years: _____ <input type="radio"/> No	
• Does or has the company contributed to a pension plan on your behalf? <input type="radio"/> Yes, in which years: _____ <input type="radio"/> No	
• Does the company contribute to a pension plan for its non-executive employees? <input type="radio"/> Yes, since: _____ <input type="radio"/> No	

Advisor Information

Name

Company Name

Address

City

Province

Postal Code

Phone

Fax

Email

Additional Notes:

Fax To: 416-364-4092

Retirement Compensation Funding Inc.
www.rcf.ca | info@rcf.ca | 416.364.6444