

## Individual Pension Plan – Illustration Questionnaire

Once completed please return this form to Vias Ltd. either:  
By fax: (450) 465-4827, or  
By e-mail: [info@vias.ca](mailto:info@vias.ca)

**Your information:** (We will send the IPP illustration to you by e-mail if provided, otherwise by fax)

Name \_\_\_\_\_ Company \_\_\_\_\_  
Phone \_\_\_\_\_ E-mail \_\_\_\_\_  
Fax \_\_\_\_\_ Your consultant \* \_\_\_\_\_

**Employer:**

Company \_\_\_\_\_  
Complete address\* \_\_\_\_\_  
Contact\* \_\_\_\_\_  
Business number with CRA\* \_\_\_\_\_  
Phone\* \_\_\_\_\_ Date of incorporation (DD/MM/YYYY) \_\_\_\_\_  
Fax\* \_\_\_\_\_ Financial year-end (DD/MM) \_\_\_\_\_

**Participant:**

Name \_\_\_\_\_  Male  Female  
Complete address\* \_\_\_\_\_  
Date of birth (DD/MM/YYYY) \_\_\_\_\_ Date of employment (DD/MM/YYYY) \_\_\_\_\_  
Title in company\* \_\_\_\_\_ Social insurance number\* \_\_\_\_\_

Spouse (if applicable)

Date of birth (DD/MM/YYYY) \_\_\_\_\_  
Sex  Male  Female

T4 earnings<sup>1</sup>

2024 _____	2016 _____	2008 _____	1999 _____
2023 _____	2015 _____	2007 _____	1998 _____
2022 _____	2014 _____	2006 _____	1997 _____
2021 _____	2013 _____	2005 _____	1996 _____
2020 _____	2012 _____	2004 _____	1995 _____
2019 _____	2011 _____	2003 _____	1994 _____
2018 _____	2010 _____	2002 _____	1993 _____
2017 _____	2009 _____	2001 _____	1992 _____
		2000 _____	1991 _____

Current RRSP and LIRA account balance<sup>3</sup> \_\_\_\_\_  
Unused RRSP deduction room as at 31/12/2023<sup>4</sup> \_\_\_\_\_

Is the member a connected person?  Yes  No  
(Owns or is related to a shareholder who owns 10% of the company's shares.)

Does the member participate or has already participated in any other pension plan or deferred profit sharing plan?  
 Yes  No

(If yes, please attach the following information: a) type of plan, b) current status of plan, c) PA for every year of participation )

Will other employers be contributing to the pension plan?  Yes  No

\* Optional information for purposes of an illustration

1 If your employment income comes from more than one company, give the amount earned from each company and explain the relationship between these companies.

2 Estimated employment income for 2024.

3 Value at the most recent date available.

4 Do not include current year's unused room. You cannot contribute to your RRSP in the year an IPP is set up.

