

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

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) _____
E-mail* _____	Financial year-end (DD/MM) _____

Participant:

Name _____	<input type="checkbox"/> Male	<input type="checkbox"/> Female
Complete address* _____		
Date of birth (DD/MM/YYYY) _____	E-mail* _____	
Title in company* _____	Date of employment (DD/MM/YYYY) _____	
	Social insurance number* _____	

Spouse (if applicable)

Date of birth (DD/MM/YYYY) _____	
Sex _____	<input type="checkbox"/> Male <input type="checkbox"/> Female

T4 earnings¹

2026 ² _____	2017 _____	2008 _____	1999 _____
2025 _____	2016 _____	2007 _____	1998 _____
2024 _____	2015 _____	2006 _____	1997 _____
2023 _____	2014 _____	2005 _____	1996 _____
2022 _____	2013 _____	2004 _____	1995 _____
2021 _____	2012 _____	2003 _____	1994 _____
2020 _____	2011 _____	2002 _____	1993 _____
2019 _____	2010 _____	2001 _____	1992 _____
2018 _____	2009 _____	2000 _____	1991 _____

RRSP and LIRA account balance as at January 1st _____

Unused RRSP deduction room as at 31/12/2024³ _____

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 2026.

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