

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 _____ Male 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 Male Female

T4 earnings¹
2026² _____ 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.