

1 — Member name _____
 Gender _____ Date of birth

Y	Y	Y	Y	M	M	D	D

 Employed by the company since

Y	Y	Y	Y	M	M	D	D

 Expected retirement age _____

2 — Company name _____
 Province of employment _____
 Incorporation date

Y	Y	Y	Y	M	M	D	D

 Date of financial year-end

M	M	D	D

3 — **Are you a connected person*?** Yes No
 *A connected person is a person who owns, either directly or indirectly (spouse, brother, sister, child, grandchild, father, mother, or spouse of brother or sister) at least 10% of any class of shares of a company or any corporation related to the company.

4 — What is the estimated income (T4 Box 14) for the current calendar year? \$ _____

5 — Complete this section if past service years will be recognized:

- List your annual salary (T4 Box 14) paid by the company indicated at point 2 for each year of employment with the company:

2023 \$ _____	2016 \$ _____	2009 \$ _____	2002 \$ _____	1995 \$ _____
2022 \$ _____	2015 \$ _____	2008 \$ _____	2001 \$ _____	1994 \$ _____
2021 \$ _____	2014 \$ _____	2007 \$ _____	2000 \$ _____	1993 \$ _____
2020 \$ _____	2013 \$ _____	2006 \$ _____	1999 \$ _____	1992 \$ _____
2019 \$ _____	2012 \$ _____	2005 \$ _____	1998 \$ _____	1991 \$ _____
2018 \$ _____	2011 \$ _____	2004 \$ _____	1997 \$ _____	
2017 \$ _____	2010 \$ _____	2003 \$ _____	1996 \$ _____	
- What was your total revenue (Box 14 on T4s) from all companies combined in 1990? \$ _____

6 — RRSP Room and Qualifying Transfers (all lines require an answer for IPP only. Use zeros where needed.)

- ▲ **Important:** You must provide your most recent **federal** notice of assessment.
- What is the total amount accumulated in the member designated savings arrangements (RRSP, LIRA, RRIF, LIF or DC plan)?

Non locked-in assets: \$ _____

Locked-in assets: \$ _____

Portion of the assets available for transfer: \$ _____

▲ The amount of assets indicated as available for transfer must be available within the next 90 days, taking into account possible withdrawal and transfer fees and possible fluctuations of the assets due to the investments.
- What is the total amount of RRSP contributions made or to be done between March 2, 2023, and March 1, 2024? \$ _____
 What is the amount of RRSP contributions made after March 1st, 2024? \$ _____
 Indicate the current amount of unused RRSP contribution room: \$ _____
- Has the company ever contributed to a pension plan, a DPSP or a group RRSP on behalf of the member?
 No Yes, in which years? _____