



# McKenna Churchill & Associates

Corporate Pension and Tax Consultants

## INDIVIDUAL PENSION PLAN QUESTIONNAIRE

Fax to: Sean McKenna at McKenna Churchill and Associates- (416) 693-0527

Submitted By: _____	Company: _____
Phone: (    ) _____	
Fax: (    ) _____	E-Mail: _____

Company (legal name): \_\_\_\_\_

Address: \_\_\_\_\_

Phone: (    ) \_\_\_\_\_ Fax: (    ) \_\_\_\_\_

To obtain an IPP illustration, please provide the information requested in the table below. Earnings must include all T4, T4A and T4PS income from your company (or related companies).

Date of Incorporation: \_\_\_\_\_ Company Yearend: \_\_\_\_\_

	Plan Member	Member's Spouse if an employee and participating
Full Name	_____	_____
Date of Birth (DD/MM/YYYY)	_____	_____
Date of Hire (DD/MM/YYYY)	_____	_____
Position in Company	_____	_____
T4 Income from Sponsoring Company		
2006 estimate		
2005		
2004	_____	_____
2003	_____	_____
2002	_____	_____
2001	_____	_____
2000	_____	_____
1999	_____	_____
1998	_____	_____
1997	_____	_____
1996	_____	_____
1995	_____	_____
1994	_____	_____
1993	_____	_____
1992	_____	_____
1991	_____	_____

RRSP Status (from CCRA's 2005 RRSP Contribution Limit Statement on individual's tax return):

Unused RRSP Deduction room at end of 2005	_____	_____
Unclaimed RRSP contributions made until end of 2005	_____	_____

Has the plan member ever been a member of any other pension plan or deferred profit sharing plan registered by this company, If YES we require 1) the type of plan, 2) assets at end of 2005- **YES NO**  
3) current status of plan and 4) PSPA information