

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

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:

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

■ What was your total revenue (Box 14 on T4s) from all companies combined in 1990? \$ _____

■ What is the total amount accumulated in your designated savings arrangements (RRSP, LIRA, RRIF, LIF or DC plan)?

Assets not locked-in: \$ _____
 Locked-in assets: \$ _____
 Portion of the assets available for qualifying transfer: \$ _____

■ Has the company ever contributed to a pension plan, a DPSP or a group RRSP on your behalf?
 Yes, in which years: _____
 No

The following information is available on your most recent Canada Revenue Agency Notice of Assessment:

- a) Tax year of your Notice of Assessment: _____
- b) Unused RRSP/PRPP deduction room at the end of the year indicated at point a): \$ _____
- c) Unused RRSP/PRPP contributions available for the year after the one indicated at point a): \$ _____
- d) RRSP contributions made this year: \$ _____