

Data Form for Quotation Request

Note: This is an interactive form. Please save this form to a local drive prior to entering your information.

Please complete the information and return to Westcoast Actuaries Inc. via one of the following:

Email:
newIPP@wainc.ca

Mail:
Westcoast Actuaries Inc.
ATTN: IPP Admin
908 - 1166 Alberni Street
Vancouver, BC
V6E 3Z3

Fax:
Westcoast Actuaries Inc.
ATTN: IPP Admin
(604) 730-1886
1-855-730-1886

If you require further information or assistance, please do not hesitate to contact us.

Minimum IPP Eligibility

A pension is an employment-related benefit for employee(s) provided by the employer. The two key eligibility requirements are:

1. A bona-fide employment relationship between the employer (the IPP sponsor) and the employee (the IPP member).
2. The member receives T4-type employment income such as salaries and wages, bonuses, taxable benefits and allowances, director's fees, and distributions from an Employee Profit Sharing Plan (EPSP) that are reported on the T4 or T4PS forms. Self-employment income and dividend income are not pension-eligible.

Prospective Member Information

First Name

Last Name

Date of Birth (*month day, year*)

Gender

- Male
 Female

Controlling Shareholder^(a)

- Yes
 No

Connected Person^(b)

- Yes
 No

Company Information

Full Legal Name

Date of Incorporation (*month, day, year*)

Prospective Member's Date of Hire (*month, day, year*)

- (a) Someone who:
- (i) in conjunction with all persons related to them, has majority (>50%) share ownership of the company;
 - (ii) has a right, either immediately or in the future, to acquire majority shares; or
 - (iii) controls the company according to the corporate governing documents.
- (b) Someone who, in conjunction with all persons related to them, owns not less than 10% of the issued shares of any class of capital stock of the employer or does not deal at arm's length with the employer.
- (c) RRSP information can be found on the [CRA website](#) through [My Account](#) or from the prospect's most recent Notice of Assessment (NOA). A copy of the prospect's NOA will be requested upon plan implementation.
- (d) All current year contributions, excluding contributions made in the first 60 days for prior year deductions.

Eligibility for Past Service Benefits

Members are eligible for past service benefits for earnings starting from 1990. However, before an employer can provide past service benefits to, or make a past service pension contribution on behalf of the IPP member, tax regulations require that the IPP member satisfy certain RRSP conditions.

Current market value of any RRSP/LIRA/DC pension assets

Carry forward RRSP room as at the end of the prior year^(c)

RRSP contributions made in the current year and not deducted for the prior year^(d)

Employment Income History

The Income Tax Act defines compensation for pension purposes as employment earnings reported in the individual's taxable income. Therefore, only T4-type income is eligible for pension purposes.

To provide T4 income history, you may:

- 1) Have the prospect's accountant retrieve and send historic T4 slips along with this form. The applicable amounts are shown in Box 14 of the T4 and Box 35 of the T4PS.
- 2) Log in to [My Account](#) and send us a copy of the prospect's T4 history along with this form.
- 3) If only estimates are available at this time, complete the fields to the right. However, this option will require a verification process prior to implementation.

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

Province of Employment _____

Submitter Information

First Name

Last Name

Company Name

Job Title

Email

Phone Number
