

Your Government Retirement Benefits

Canada Pension Plan (CPP 211) benefits

Have you made contributions to CPP/QPP?

You

Spouse/Partner

If yes, for how many years since 1966?

You

Spouse/Partner

If you are already in receipt of a CPP? QPP/foreign pension, survivor or disability benefit, please provide details.

Old Age Security

How many years have you lived in Canada after the age of 18?

You:

Spouse/Partner:

How concerned are you about optimizing the amount of Old Age Security benefits you may receive?

You:

Spouse/Partner:

Would you like to improve your understanding of the impact of future retirement income on government benefits to optimize the government's contribution to your retirement income and support! ☐ Yes ☐ No

Please explain:

Advisor notes, comments and recommendations