

Registered Retirement Plans

Employer Sponsored Retirement Programs/Pension Plans

Do you know how your company pension plan is structured to provide future amounts of retirement income in your pension statement?

You:

Spouse/Partner:

Do you or your spouse have locked-in retirement accounts from previous pension plans?

Your amount: \$

Spouse amount: \$

Where are these funds held?

You:

Spouse/Partner:

If yes, how interested would you be in exploring options for unlocking some of this money prior to retirement?

Registered Retirement Savings Plans

How much do you plan to set aside in annual RRSP contributions until retirement?

You

Spouse/Partner

Amount of unused RRSP contribution room:

You

Spouse/Partner

If you are making contributions to a spousal plan, when was the last contribution made?

Advisor notes, comments and recommendations