

# Retirement Income Projection Questionnaire

Please complete the information below as accurately as possible.

## Your Information:

1. Name: \_\_\_\_\_ Email: \_\_\_\_\_ Phone: \_\_\_\_\_

2. Date of Birth (Day/Month/Year): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Province of Residence: \_\_\_\_\_

3. Employer: \_\_\_\_\_ Years of Service: \_\_\_\_\_

Current Salary: \$ \_\_\_\_\_ Preferred Retirement Year: \_\_\_\_\_ Other Income Pre-retirement: \$ \_\_\_\_\_  
 (e.g. Net rental income)

4. Employer Pension Estimate: \$ \_\_\_\_\_

5. Other Income After Retirement (Not Including CPP & OAS): \$ \_\_\_\_\_ Please Specify: \_\_\_\_\_

## 6. Summary of Your Accounts

Plan Type	Approximate Market Value	Regular Contributions (bi-weekly, monthly, annual)
Tax-Free Savings Account (TFSA)	\$ _____	\$ _____ ( bw / pm / pa)
Registered Retirement Savings Plan (or spousal RRSP)	\$ _____	\$ _____ ( bw / pm / pa)
Locked-In Retirement Account (LIRA) / LRSP	\$ _____	\$ _____ ( bw / pm / pa)
Open / Non-Registered	\$ _____	\$ _____ ( bw / pm / pa)
Other (Please Specify): _____	\$ _____	\$ _____ ( bw / pm / pa)

## Your Spouse's Information

1. Name: \_\_\_\_\_

2. Date of Birth (Day/Month/Year): \_\_\_\_ / \_\_\_\_ / \_\_\_\_

3. Employer: \_\_\_\_\_ Years of Service: \_\_\_\_\_

Current Salary: \$ \_\_\_\_\_ Preferred Retirement Year: \_\_\_\_\_ Other Income Pre-retirement: \$ \_\_\_\_\_  
 (e.g. Net rental income)

4. Employer Pension Estimate (If Applicable): \$ \_\_\_\_\_

5. Other Income After Retirement (Not Including CPP & OAS): \$ \_\_\_\_\_ Please Specify: \_\_\_\_\_

## 6. Summary of Your Accounts

Plan Type	Approximate Market Value	Regular Contributions (bi-weekly, monthly, annual)
Tax-Free Savings Account (TFSA)	\$ _____	\$ _____ ( bw / pm / pa)
Registered Retirement Savings Plan (or spousal RRSP)	\$ _____	\$ _____ ( bw / pm / pa)
Locked-In Retirement Account (LIRA) / LRSP	\$ _____	\$ _____ ( bw / pm / pa)
Open / Non-Registered	\$ _____	\$ _____ ( bw / pm / pa)
Other (Please Specify): _____	\$ _____	\$ _____ ( bw / pm / pa)