

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: _____
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)