

McFarlane Amerlee Consulting Limited

47, 35 Inglewood Park SE Calgary, AB T2G 1B5

Phone: (403) 265-5050 Fax: (403) 265-2426

Email: lee@mcfarlaneamerlee.com

vicki@mcfarlaneamerlee.com

monica@mcfarlaneamerlee.com

admcfarlane@mcfarlaneamerlee.com

Website: www.mcfarlaneamerlee.com

Individual Pension Plan Questionnaire

Company: _____ Fiscal Year End: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Telephone: () _____ Fax: () _____

Email Address: _____

Prospective Plan Member Information

Name: _____ Gender: M or F

Marital Status: _____ Date of Birth: _____ Date of Hire: _____
(dd/mm/yyyy) (dd/mm/yyyy)

Spouse Information (to be completed only if spouse employed by same or related company)

Name: _____

Date of Birth: _____ Date of Hire: _____
(dd/mm/yyyy) (dd/mm/yyyy)

1. Are you a "connected person" (i.e., do you own 10% or more of any class of shares of the company or are you related to anyone who does)? Yes _____ No _____
2. Do you or did you (or your spouse, if applicable) participate in a DPSP or a registered pension plan sponsored by your company or another company? (provide details if yes) Yes _____ No _____
3. Do you or did you (or your spouse, if applicable) collect compensation from more than one employer associated with the company mentioned above? (If yes, please provide a breakdown of compensation from each employer.) Yes _____ No _____

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Individual Pension Plan Questionnaire

| Year | Plan Member Earnings* | Spouse Earnings |
|-----------------|-----------------------|-----------------|
| 2017 (estimate) | | |
| 2016 | | |
| 2015 | | |
| 2014 | | |
| 2013 | | |
| 2012 | | |
| 2011 | | |
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| 1995 | | |
| 1994 | | |
| 1993 | | |
| 1992 | | |
| 1991 | | |
| 1990 | | |

NOTE: If a decision is made to proceed with plan implementation, please provide copies of T4 slips for the above noted years.

| | Plan Member | Spouse |
|---|-------------|--------|
| Unused RRSP room @ Dec. 31, 2016 * | | |
| Value of own *** RRSP accounts @ December 31, 2016 | | |
| Value of own *** (not spousal) RRSP account at present time | | |
| Estimated Retirement Year or Age | | |

*T4 or T4PS earnings

Do not include new 2017 RRSP contribution room. * Including account to which spouse has contributed