

## How Your RRSPs May Devastate Your Retirement Plan! - Worksheet

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Street Address:

\_\_\_\_\_

City: \_\_\_\_\_

Province: \_\_\_\_\_

Postal Code: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Email address: \_\_\_\_\_

Your Date of Birth: \_\_\_\_\_

Do you file your income **tax** as married or equivalent \_\_\_\_\_ Yes \_\_\_\_\_ No

Your Spouse's Date of Birth: \_\_\_\_\_

Current value of your RRSP or RRIF

RRSP/RRIF #1 \$ \_\_\_\_\_ RRSP/RRIF #2 \$ \_\_\_\_\_

RRSP/RRIF #3 \$ \_\_\_\_\_ RRSP/RRIF #4 \$ \_\_\_\_\_

If you have more than 4 accounts please list them.

To better assess your situation please provide the following optional information:

The information is available on your most recent Income Tax Return or on your most recent Notice of Assessment.

Line 150 Total Income \$ \_\_\_\_\_

Line 236 Net Income \$ \_\_\_\_\_

Line 260 Taxable Income \$ \_\_\_\_\_

Year of tax return or Notice of Assessment \_\_\_\_\_

Are you a member of a company pension plan? \_\_\_\_\_ Yes \_\_\_\_\_ No

Is the pension plan indexed? \_\_\_\_\_ Yes \_\_\_\_\_ No

What is the gross amount of all pensions (you and your spouse) \_\_\_\_\_

Please fax the above form to:

(604) 207-9971

Or scan and/or

Email: [mhuber@HowToBeSetForLife.com](mailto:mhuber@HowToBeSetForLife.com)

Telephone: (604) 207-9970.

HowToBeSetForLife.com

