

RRSP/RRIF Planner

Prepared By:

Date:

1 Client Information

Client _____ Spouse/Partner _____
DOB _____ DOB _____

2 Client Data

RRSP/RRIF Value \$ _____ Contributions \$ _____ Index _____ %

Frequency: Annual Monthly Timing: Beginning of Period End of Period

Rate of Return: _____ % Retirement Age (RRIF Begins) _____

Number of Years Income Needed _____ Income Index _____ %

3 Spouse/Partner Data

RRSP/RRIF Value \$ _____ Contributions \$ _____ Index _____ %

Frequency: Annual Monthly Timing: Beginning of Period End of Period

Rate of Return: _____ % Retirement Age (RRIF Begins) _____

Number of Years Income Needed _____ Income Index _____ %