

INDIVIDUAL PENSION PLAN COVERING LETTER

Complete questions applicable to the new IPP account.

	Direction on policy setup (one plan for multiple people)
	Number of annuitant's (people/plan members) covered (husband and wife under one plan)
	Relationship of annuitant(s) (people/plan members) to company

	Name of Trustee
	Name of Trustee
	Name of Trustee
	Name of Trustee who acts on behalf of all Trustees (if any)

	Background/Rationale for IPP
	Checklist
	<input type="radio"/> Corporation/Organization Owner Supplement (C-0044)
	<input type="radio"/> IPP document indicating names of trustees and conditions of the IPP
	<input type="radio"/> Identification with supporting documentation on whether one trustee can act on behalf of all
	<input type="radio"/> Letter of direction/intent signed by the trustee(s) of the IPP
	<input type="radio"/> Risk tolerance questionnaire/assessment (attach with application)

Agent of record (please print)	Date (dd/mmm/yy)
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