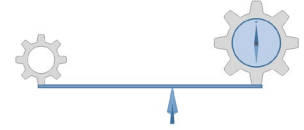


FINEPOINT SOLUTIONS INC.

Canada Pension Plan (CPP) Analysis

Input sheet



Required client information

The following information is required in order for FinePoint Solutions Inc. to perform your CPP Analysis.

If the analysis is for a couple, we require the information for both persons.

First Name:

Last Name:

Date of Birth (yyyy/mm/dd):

Gender (required for life expectancy calculations):

CPP Statement of Contributions – [you must obtain this from Service Canada*](#)

What CPP benefit(s) are you currently receiving? Complete for all that apply.

Check if applies (✓)	Benefit type	Start date (yyyy/mm/dd)	Initial amount	Current amount
	Retirement pension			
	Disability pension			
	Survivor's benefit			

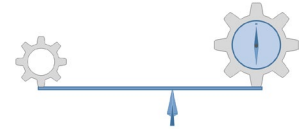
What CPP benefit(s) have you received in the past? Complete for all that apply.

Check if applies (✓)	Benefit type	Start date (yyyy/mm/dd)	End date (yyyy/mm/dd)	Final amount
	Retirement pension			
	Disability pension			
	Survivor's benefit			

FINEPOINT SOLUTIONS INC.

Canada Pension Plan (CPP) Analysis

Input sheet



If you have ever had any legal or common-law spouse(s), please provide the following details about the relationship (starting with your current or most recent spouse).

Name of spouse	Date started living together (yyyy/mm/dd)	Date ceased living together (yyyy/mm/dd)	Status (ongoing, separated, divorced)

If you have children, please provide the following details.

Name of child	Date of birth (yyyy/mm/dd)

* A Statement of Contributions (SOC) is a record of your CPP contribution history. This is the most important information we require to estimate your CPP benefits.

You can obtain a SOC by the following ways:

1. Contact Service Canada and request a copy. It will be mailed to the address Service Canada has on file.
2. Log in to your My Service Canada Account (MSCA) – the information can be saved.
3. You can authorize us to communicate with Service Canada directly. In this case, we can request a copy on your behalf and it will be mailed to the address Service Canada has on file – we will require additional personal information from you for this option (ask us for more information about this convenient and secure method if you are interested).