



ASSANTE
WEALTH MANAGEMENT

ALEXANDRIA
WEALTH MANAGEMENT GROUP

Individual Pension Plan

Case Study

Member Age

55 Years of Age

01

Amount of Time Incorporated

10

02

Annual Employment Income

\$187,800

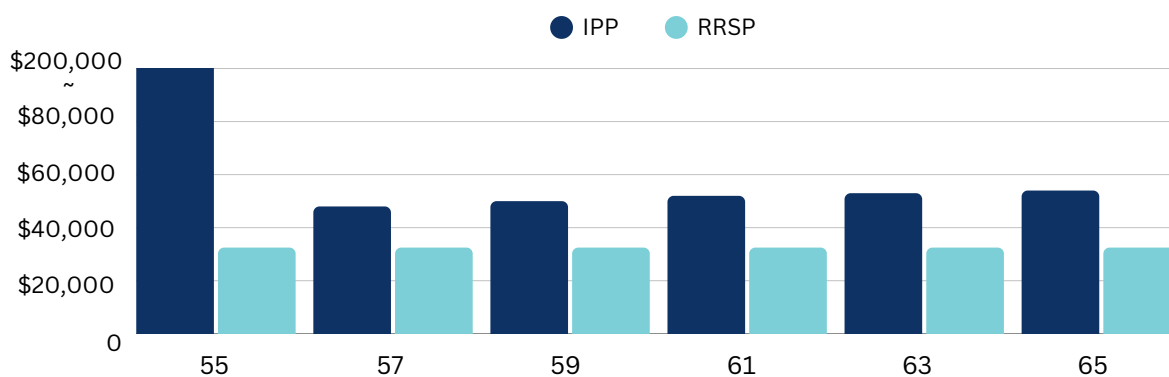
03

Registered Retirement Savings Plan (RRSP) Balance

\$270,000

04

Resulting IPP vs RRSP Annual Contributions



Source: GBL Inc. For demonstration purposes only.



The pension plan
that works as hard
as you do

Resulting IPP vs RRSP Total Savings

Additional Contribution Room in Year 1

\$198,000

01

Net Increase in Contributions to 71

\$436,000

02

Net Increase in Retirement Savings to 65

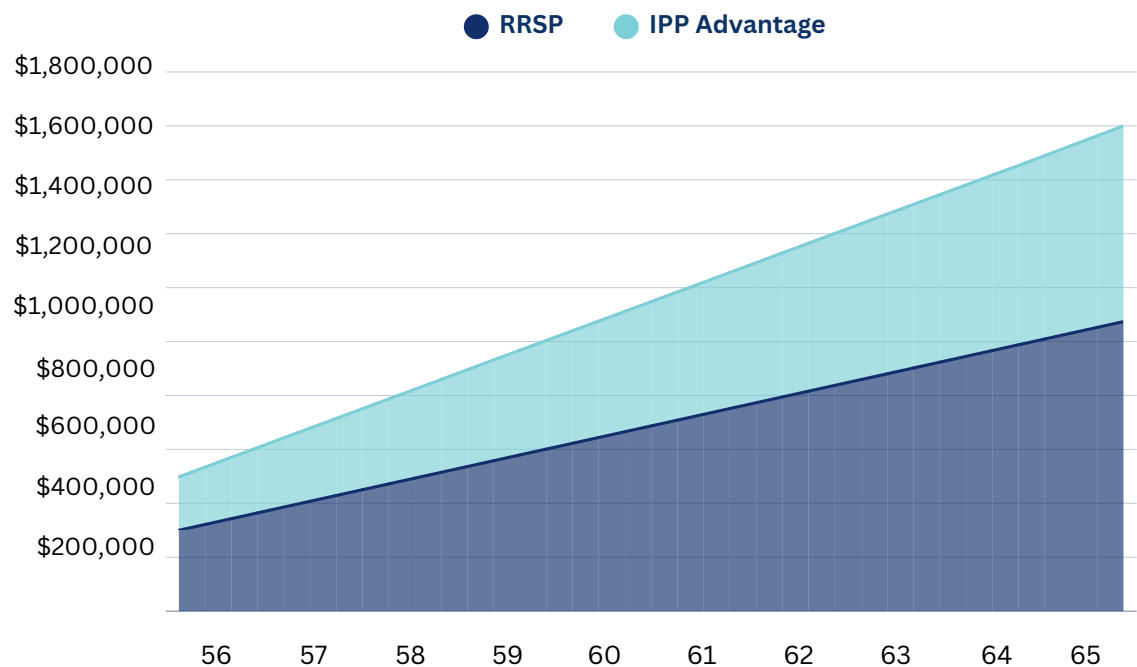
\$726,000

03

Total Retirement Savings Accumulated and Sheltered

\$1,800,000

04



Source: GBL Inc. For demonstration purposes only.



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Disclaimer

The case study mentioned in this material is provided for illustrative purposes only and does not represent an actual client or an actual client's experience, but rather is meant to provide an example of our process and methodology. The results portrayed is not representative of all of our clients' experiences.

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