

Septen Financial Ltd can prepare a Frustration65 plan on my behalf.

Date: _____

Name: _____

Street Address: _____

City: _____

Province: _____

Postal Code: _____

Telephone Number: _____ Email address: _____

Your age on December 31: _____

Do you file your income tax as married or equivalent _____ Yes _____ No

If yes, your partner's age on December 31: _____

(please fill out a separate form for your partner if he or she is interested in Frustration 65)

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 on a separate sheet of paper.

To better assess the suitability of a Frustration 65 solution to 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 your company pension? _____

Please mail form to: Septen Financial Ltd.
 #235-8100 Rock Island Highway,
 Trail, BC V1R 4N7
 Or fax to: (250) 364-3138