

PPP Candidate Profile



1. Employment Type

Incorporated Professional or Business Owner.
Must be paid a T4 salary from a corporation (not just dividends).

2. Income

Earning \$70,000+ in Annual T4 Salary.
Higher income = more contribution room and tax deductions.
Contributions increase with age.



3. Goals

Looking to Maximize Tax Deductions.
Has high corporate taxes and wants to shift income to tax-deferred assets.

4. Long-Term Retirement Planning

Wants more than just an RRSP — higher contribution limits and predictable pension income.
Values tax-deferred growth and a structured retirement income stream.



5. Family Strategy

Wants to add a spouse or children (age 14+) to the plan if they work for the corporation and take a T4.
Sees the PPP as a tool for legacy planning, corporate purification, and wealth transfer.

6. Asset Protection

Concerned About Creditor Protection.
Seeks to protect retirement assets from lawsuits or business risks.



Questions?

Contact Ava Clarke, Manager of Sales at INTEGRIS.

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Want an illustration



Fill out out the questionnaire here:
<https://integrus-mgt.com/start/>