



For Promoter Use Only

Subscriber-Only Application for :

(Use this form only when the Subscriber is also the Custodial Parent / Legal Guardian and the Primary Caregiver of the Beneficiary)

- Basic Canada Education Savings Grant
Additional Canada Education Savings Grant
Canada Learning Bond

Protected "B" When Completed - Personal Information Banks HRSDC PPU 390 and HRSDC PPU 506

Instructions :

- 1. Check above all the incentives you wish to apply for.
2. Read this document carefully. If you have any questions, do not hesitate to ask the Promoter.
3. This form is valid only if completed, signed, dated and given to the Promoter. Do not send directly to HRSDC.
4. Please print clearly. Keep a copy for your records.

Subscriber form fields: Last Name, First Name, Middle Name/Initial, Address, Postal Code, Social Insurance Number, Business Number, Joint Subscriber, Beneficiary, Promoter, Name, Address, Postal Code, Telephone, RESP Specimen Plan Number, RESP Contract Number

Explanation of Key Words *

Agent - Organization through which the Trustee (or the Promoter) may exercise and perform its powers, duties and functions in accordance with their respective agreement with Human Resources and Skills Development Canada.
Beneficiary - Individual who will receive money to help pay for his or her post-secondary education (e.g. college, university, or trade school), if they qualify under the terms of the Registered Education Savings Plan (RESP).
Custodial Parent or Legal Guardian - Individual, department, agency or institution that has the responsibility of taking care of the child and the legal right to make decisions affecting the child's interests.
Primary Caregiver - Individual who is eligible for the Canada Child Tax Benefit (CCTB) - sometimes called family allowance or baby bonus - and whose name appears on the CCTB payments and annual Notice; or the department, agency or institution that receives the allowance payable under the Children's Special Allowances Act.
Promoter - Individual or organization offering an RESP to the public and who will open an RESP for the Subscriber.
Subscriber - Individual or Child Care Agency who opens an RESP, names one or more Beneficiaries and may deposit money (contributions) for them into the RESP.
Trustee - Financial organization that invests, administers and distributes the money in the RESP for the Beneficiary.
*Note: The above explanations are provided for your information only and do not constitute the legal definitions. In the event of a discrepancy, the legal definitions found in the Canada Education Savings Act and the Income Tax Act shall prevail.

Your Privacy Rights

Human Resources and Skills Development Canada protects the confidentiality of your personal information. We cannot give your personal information to any person or organization without your written consent, except where authorized by legislation. You (or your authorized representative) have the right to request a copy of the information in your file.
Personal information and other information included on this form will be kept in Personal Information Banks "HRSDC PPU 506" and "HRSDC PPU 390" of Human Resources and Skills Development Canada. The data banks use the beneficiary SIN as the primary identification field. The beneficiary's SIN is collected under the authority of Canada Education Savings Act.
Instructions for obtaining a copy of your personal information can be found in Info Source. You can get a printed copy of Info Source at Human Resources Centres of Canada or by calling 1 800 O-Canada (1 800 622-6232) or you may view the information at www.infosource.gc.ca.

Where to get more information about the Canada Education Savings Program:
Phone: 1 888 276-3624
1 800 465-7735 for TTY users only
E-mail: cesp-pcee@hrsd-rhdcc.gc.ca
Internet: www.hrsdc-rhdcc.gc.ca

Ce formulaire est disponible en français





Conditions

1. In order for the Basic and Additional Canada Education Savings Grant to be paid, the Beneficiary must be resident in Canada at the time of each contribution to the RESP and for a Canada Learning Bond to be paid, the Beneficiary must be resident in Canada immediately before a Canada Learning Bond payment is made.
2. An Additional Canada Education Savings Grant and/or Canada Learning Bond may be paid only if the RESP has one Beneficiary or, if there is more than one, every Beneficiary is a brother or sister of every other Beneficiary.
3. If the Beneficiary is 16 or 17, at least one of the following must have occurred in order for the Beneficiary to be eligible for the Basic and Additional Canada Education Savings Grant:
 - in any four years before the end of the year in which the Beneficiary turned 15, a total of at least \$100 per year must have been contributed to one or more RESPs in respect of the Beneficiary, and not withdrawn; or
 - a total of at least \$2,000 must have been contributed to one or more RESPs in respect of the Beneficiary before the end of the year in which the Beneficiary turns 15, and not withdrawn.

Sharing of your Personal Information

I understand that:

1. The authority of the Government of Canada to collect, share, and use personal information and other information included on this form for the purposes described below is provided under the *Department of Human Resources and Skills Development Act*, the *Canada Education Savings Act* and the *Income Tax Act*. Once under the control of Human Resources and Skills Development Canada, that information is administered in accordance with all applicable laws including the *Canada Education Savings Act*, the *Privacy Act* and the *Department of Human Resources and Skills Development Act*. Once under the control of Canada Revenue Agency, that information is administered in accordance with all applicable laws including the *Privacy Act* and the *Income Tax Act*.
2. The information included on this form and the information respecting the RESP may be used by and shared between Human Resources and Skills Development Canada, the Canada Revenue Agency, the promoter and Trustee and their Agents for the administration (which may include policy analysis, research and evaluation) of the *Canada Education Savings Act* and the *Income Tax Act*.
3. In order for a payment of the Additional Canada Education Savings Grant and/or Canada Learning Bond to be made, my adjusted family income will be verified with the Canada Revenue Agency. My adjusted family income information will be provided to Human Resources and Skills Development Canada by the Canada Revenue Agency.

Declaration and Consent

I authorize the promoter to ask the Trustee to apply for the grants I have indicated on the previous page in respect of the Beneficiary.

I confirm that I am the Custodial Parent or Legal Guardian and that I am the Primary Caregiver of the Beneficiary.

I confirm that the Beneficiary meets the residency requirements set out above and agree to inform the Trustee if, at any time, there is a change in the Beneficiary's circumstances.

I designate the RESP indicated in this document to receive, in trust, any payments of the Additional Canada Education Savings Grant and/or Canada Learning Bond.

I have read and understood this document. I understand that the *Privacy Act* gives me (or my authorized representative) the right to access or request correction to my personal information kept in my government file.

Yes No I consent to the use and sharing of my personal information as mentioned above.

NOTE: I understand that the provision of the information is voluntary and that I am not required to give my consent; however, if I do not give my consent, Human Resources and Skills Development Canada cannot pay the Basic and/or Additional Canada Education Savings Grant nor the Canada Learning Bond to the Trustee in respect of the RESP Beneficiary.

Signature of Subscriber who is also the Custodial Parent / Legal Guardian and Primary Caregiver of the Beneficiary

| y | y | y | y | | m | m | | d | d |
Date

Signature of Joint Subscriber (if applicable)

| y | y | y | y | | m | m | | d | d |
Date