



For Promoter Use Only

Application for:

Use this form to apply for one or more of the incentives shown at right.

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

Protected "B" When Completed - Personal Information Bank HRSDC PPU 506

Part A - Subscriber

Instructions :

1. Check the incentives you are applying for at the top of each of the three parts of this form. Please note that Part C - Primary Caregiver (pages 5 and 6) is not required if you apply only for the Basic Canada Education Savings Grant.
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	Last Name	First Name	Middle Name/Initial
(Is this you? Please see explanation below)	Address		Postal Code
	or Name of Agency and Name of Representative		Business Number
Joint Subscriber	Last Name	First Name	Middle Name/Initial
(If applicable - may be the Subscriber's spouse)			
Beneficiary	Last Name	First Name	Middle Name/Initial
(Please see explanation below)			
Promoter	Name, Address, Postal Code		Telephone
(This block to be completed by the Promoter)	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 Bank "HRSDC PPU 506" 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 are available 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). You may also view the information electronically on the web 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-rhdsc.gc.ca

Internet: www.hrsdc-rhdsc.gc.ca





For Promoter Use Only

Part A - Subscriber (continued)

Conditions

- 1. In order for the Basic and Additional Canada Education Savings Grant to be paid...
2. An Additional Canada Education Savings Grant and/or Canada Learning Bond may be paid only if the RESP has one Beneficiary or...
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:

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...
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...
3. My name and address will be shared with the Beneficiary or, if the Beneficiary is under the age of 19 years and either ordinarily resides with a parent or is maintained by a public Primary Caregiver...

Declaration and Consent of the Subscriber

I authorize the Promoter to ask the Trustee to apply for the incentives I have indicated on the previous page in respect 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 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.

Consent form with checkboxes for Yes/No and a note: 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.

Subscriber's Signature

Date

Joint Subscriber's Signature (if applicable)

Date



For Promoter Use Only

- Application for:**
- 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

Part B - Custodial Parent or Legal Guardian, or Beneficiary aged 18 or older

Instructions :

- You are asked to complete this form because an application has been made for the incentives indicated above either for you, the Beneficiary aged 18 or older, or for the Beneficiary for whom you are the Custodial Parent or Legal Guardian.
- Read this document carefully. If you have any questions, do not hesitate to ask the Promoter identified below.
- This form is valid only if completed, signed, dated and given to the Promoter. Do not send directly to HRSDC.
- Please print clearly. Keep a copy for your records.

Custodial Parent or Legal Guardian <small>(Is this you? Please see explanation below)</small>	Last Name	First Name	Middle Name/Initial
	or Name of Agency and Name of Representative		
Beneficiary <small>(Please see explanation below - Enter name as on SIN card)</small>	Last Name	First Name	Middle Name/Initial
	Date of Birth	Male <input type="checkbox"/> Female <input type="checkbox"/>	Social Insurance Number
	y y y y m m d d		
Promoter <small>(This block to be completed by the Promoter)</small>	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 Bank "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 are available 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). You may also view the information electronically on the web 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-rhdsc.gc.ca
- Internet:** www.hrsdc-rhdsc.gc.ca





For Promoter Use Only

Part B - Custodial Parent or Legal Guardian, or Beneficiary aged 18 or older (continued)

Sharing of your Personal Information

I understand that:

- 1. The Subscriber intends to open a RESP with the Promoter that will have the Promoter pay or cause to be paid Educational Assistance Payments out of the RESP for the Beneficiary.
2. The Subscriber has requested that a payment of the Basic and/or Additional Canada Education Savings Grant and/or the Canada Learning Bond be paid into the RESP in respect of the Beneficiary.
3. 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.
4. The information included on this form may be used by and shared between Human Resources and Skills Development Canada, the Canada Revenue Agency, the Promoter, the 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.

Declaration and Consent of the Custodial Parent or Legal Guardian, or Beneficiary aged 18 or Older

I confirm that I am the Custodial Parent or Legal Guardian of the Beneficiary, or that I am the Beneficiary and am aged 18 or older.

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 the Beneficiary's personal information kept in the government file.

[] Yes [] No I consent to the use and sharing of the Beneficiary's 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 the Custodial Parent or Legal Guardian, or of Beneficiary aged 18 or older

Date



For Promoter Use Only

- Application for:**
- Basic Canada Education Savings Grant**
 - Additional Canada Education Savings Grant**
 - Canada Learning Bond**

Protected "B" When Completed - Personal Information Bank HRSDC PPU 506

Part C - Primary Caregiver

(This Part Not Required if Applying Only for the Basic Canada Education Savings Grant)

Instructions :

- You are asked to complete this form because an application has been made for the incentives indicated above in respect of the Beneficiary identified below.
- Read this document carefully. If you have any questions, do not hesitate to ask the Promoter identified below.
- This form is valid only if completed, signed, dated and given to the Promoter. Do not send directly to HRSDC.
- Please print clearly. Keep a copy for your records.

Primary Caregiver <small>(See explanation below. Enter name as on your CCTB Notice)</small>	Last Name	First Name	Middle Name/Initial	Social Insurance Number
Public Primary Caregiver <small>(if applicable)</small>	Name of Agency and Name of Representative		Business Number	
Beneficiary <small>(Please see explanation below)</small>	Last Name	First Name	Middle Name/Initial	
Promoter <small>(This block to be completed by the Promoter)</small>	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 Bank "HRSDC PPU 506" 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 are available 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). You may also view the information electronically on the web 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-rhdsc.gc.ca

Internet: www.hrsdc-rhdsc.gc.ca



For Promoter Use Only

Part C - Primary Caregiver (continued)

Sharing of your Personal Information

I understand that:

- 1. The Subscriber has authorized the Promoter to request the Trustee to apply for the Additional Canada Education Savings Grant and/or the Canada Learning Bond in respect of the Beneficiary.
2. 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.
3. The information included on this form may be used by and shared between Human Resources and Skills Development Canada, the Canada Revenue Agency, the Promoter, the 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.
4. 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 unless the beneficiary is maintained by a department, agency or institution. My adjusted family income information will be provided to Human Resources and Skills Development Canada by the Canada Revenue Agency.

Declaration and Consent of the Primary Caregiver

I confirm that I am the Primary Caregiver or the Public Primary Caregiver's authorized representative of the Beneficiary.

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, Human Resources and Skills Development Canada can pay the Basic Canada Education Savings Grant to the Trustee in respect of the RESP Beneficiary but not the Additional Canada Education Savings Grant or the Canada Learning Bond.

Signature of Primary Caregiver or Public Primary Caregiver's authorized representative

Date

