

Education Savings Plan Payment Request (EAP, PSE and Contribution Withdrawal)

Date : _____ Account number: _____ Subscriber's name: _____

Client Requirements:	<ul style="list-style-type: none"> One completed Education Savings Plan Request form per beneficiary EAP or PSE only, acceptable proof of enrolment for the current semester is MANDATORY (see below for info on acceptable proof of enrolment) To submit this request the Payment Methods section on this form must be completed
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1. **Educational Assistance Payment (EAP):** This payment consists of RESP Grant and tax deferred RESP income. Payment proceeds are payable to the beneficiary and are considered as income to the beneficiary at the time of withdrawal. (T4A slip is issued).

EAP withdrawal amount: \$ _____ Beneficiary's SIN : _____ Beneficiary's name: _____

Should the total sum of Grant and earnings be not sufficient to equal the EAP payment requested, would you like to elect a Post-Secondary Education (PSE) payment for the balance of the EAP? **Yes** (Please complete the Post-Secondary (PSE) section below) **No**

2. **Post-Secondary Educational (PSE):** This Payment consists of contributions and the requirement to repay Grant does not exist.

If the payment is not made to complete an EAP, please specify the PSE amount requested: \$ _____

PSE Payment Proceeds are payable to: **Beneficiary** (The Subscriber(s) must provide an authorization letter)
(Please complete section 4) **Subscriber**

3. **Contribution Withdrawal:** Payment consists of contributions, and no proof of enrolment in a qualifying educational program is required for this type of withdrawal. The CESG (Grant) is reimbursed to HRSDC and this amount will reflect as a reduction in the withdrawal proceeds. The amount returned will vary between 20 % and 40 % of the amount withdrawn

Requested amount : : \$ _____

4. Payment methods

To beneficiary:

EFT deposit to the bank account (void cheque attached) from the beneficiary's trading account : # _____

Institution	Branch	Account number
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Deposit to their trading account: # _____ in \$\$ in kind (please provide a list of securities)

Cheque To this address: _____

To subscriber:

EFT deposit to the bank account (void cheque attached) from the subscriber's trading account : # _____

Institution	Branch	Account number
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Deposit to their trading account: # _____ in \$\$ in kind (please provide a list of securities)

Cheque To this address: _____

Acceptable proof of Enrolment	<ul style="list-style-type: none"> Name of beneficiary and educational institution; Name or number of program of study; Session (fall, winter, summer); and The student status (full or part-time)
Admission confirmations are not accepted. The promoter can only accept proof of enrolment for the current semester. This proof must include the following information:	

Requested by : _____ Contact Details _____

(Dealer Name, Telephone number, Email, etc.)