

## Education Savings Plan Beneficiary Addition / Update Form

Please Complete

**ADD A BENEFICIARY (Family & Grandfathered plans only)**      **UPDATE BENEFICIARY INFORMATION**

Information contained on this form, as well as amounts of the plan, may be shared with the custodial parent. Information will also be provided to Human Resources Development Canada, the federal department responsible for the program and the Canada Customs & Revenue Agency for taxation purposes.

Date (YY/MM/DD)      Account Number

Subscriber's Last Name      Subscriber's First Name

If applicable:

Co-subscriber's Last Name      Co-subscriber's First Name

**A**

The following person is designated as a beneficiary entitled to receive educational assistance payment under this Plan.

Title      Last Name      First Name

Home Address (number, street)      Suite No.

City or Town      Prov.      Postal Code

SIN      Birth Date (YY/MM/DD)       Male      Female

Relationship to subscriber

**If the Beneficiary is less than 19 years of age AND if the Subscriber is not the Custodial Parent, Legal Guardian or Public Primary Caregiver:**

Name of Custodial Parent, Legal Guardian or Public Primary Caregiver:

Last Name      Initials      First Name

Address of Custodial Parent, Legal Guardian or Public Primary Caregiver:

Address:  Same as Subscriber      Same as Beneficiary      Different address (complete section below)

Home Address (number, street)      Suite No.

City or Town      Prov.      Postal Code

Beneficiary Information

**B**

**Education Savings Grants Application**

Do you wish the trustee to apply for any education grants on your behalf?      Yes      No  
 If there is more than one beneficiary in the receiving plan, are they all brothers or sisters?      Yes      No

**Canada Education Savings Plan Grant (CESG)**

Is the Subscriber the Custodial parent, Legal Guardian or the Primary Caregiver of the Beneficiary?  
 Yes, then complete the "Canada Education Savings Grant Application" - CESG form (#SDE0093) ([http://www.bmoinvestorline.com/ApplyNow/forms/BasicAdditional\\_EducationSavingsGrant\\_App.pdf](http://www.bmoinvestorline.com/ApplyNow/forms/BasicAdditional_EducationSavingsGrant_App.pdf))  
 No, then complete the "Canada Education Savings Grant Application" - CESG form (#SDE0071) ([http://www.bmoinvestorline.com/ApplyNow/forms/BasicAdditional\\_EducationSavingsGrant\\_App2.pdf](http://www.bmoinvestorline.com/ApplyNow/forms/BasicAdditional_EducationSavingsGrant_App2.pdf))

**Alberta Centennial Education Savings Plan Grant (ACES)**

If the subscriber is eligible for the ACES as defined in the "Alberta Residency Requirement" section of the "Application for Alberta Centennial Education Savings Plan Grant" then the ACES1 form must be completed. ([http://www.bmoinvestorline.com/ApplyNow/forms/AlbertaEducationSavingsGrant\\_App.pdf](http://www.bmoinvestorline.com/ApplyNow/forms/AlbertaEducationSavingsGrant_App.pdf))

**Québec Education Savings Incentive (QESI)**

The trustee will automatically apply for and directly deposit the basic tax incentive for all eligible Registered Education Savings Plans (RESP) held with BMO InvestorLine. No application form is required.

Grants

C

Authorization

I confirm that the beneficiary is a resident of Canada.  
I understand residency is a requirement for receiving a grant under the Canada Education Savings Grant Program.  
I undertake to advise the trustee if the beneficiary is no longer resident in Canada at the time of any subsequent contribution in relation to that beneficiary.  
I further undertake to advise the plan trustee if the beneficiary is a non-resident at the time an educational assistance payment is requested.

\_\_\_\_\_  
Subscriber Signature

\_\_\_\_\_  
*Date (YY/MM/DD)*

\_\_\_\_\_  
Co-subscriber Signature (if applicable)

\_\_\_\_\_  
*Date (YY/MM/DD)*