



ANNEX C

APPLICATION: Saskatchewan Advantage Grant for Education Savings (SAGES)

APPLICATION: Canada Education Savings Grant (CESG) and Canada Learning Bond (CLB)
This annex is only for beneficiaries who are residents of Saskatchewan.

Instructions:

1. This annex is to be completed and signed by the subscriber(s) of the Registered Education Savings Plan (RESP). The custodial parent/legal guardian also must sign if different than the subscriber(s).
2. Read this document carefully. If you have questions, do not hesitate to ask the RESP provider.
3. This annex is valid only if completed, signed, dated and given to the RESP provider. **Do NOT send directly to Employment and Social Development Canada (ESDC).**
4. Keep a copy for your records.

RESP provider

RESP contract No.

Global Educational Trust Foundation - 100 Mural Street, Suite 201, Richmond Hill, Ontario L4B 1J3 - 1-866-460-7377 - RESP Specimen Plan Number 1049001 and 1049003

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Information about the subscriber(s)

You are the **subscriber** if you opened the RESP for the eligible children.

Subscriber's family name (last name)

Subscriber's given name (first name)

If applicable.

Joint subscriber's family name (last name)

Joint subscriber's given name (first name)

In the case of a **child care agency**.

Name of agency

Name of agency representative

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Information about the beneficiaries

If you answer NO, the SAGES will not be paid.

YES NO

There is only one beneficiary named to this RESP **OR** all beneficiaries are siblings **AND** all beneficiaries listed on this annex are residents of Saskatchewan (SK).

Beneficiary's family name (last name)

Beneficiary's given name (first name)

Date of birth (yyyy/mm/dd)

Sex

SK resident since (yyyy/mm/dd)

Male Female

The **beneficiary** is the child named by the subscriber who will receive the education savings incentives to help pay for his or her post-secondary education if they qualify under the terms of the RESP.

Beneficiary's family name (last name)

Beneficiary's given name (first name)

Date of birth (yyyy/mm/dd)

Sex

SK resident since (yyyy/mm/dd)

Male Female

Beneficiary's family name (last name)

Beneficiary's given name (first name)

Date of birth (yyyy/mm/dd)

Sex

SK resident since (yyyy/mm/dd)

Male Female

For more than three beneficiaries, attach additional copies of this annex.

Additional beneficiaries - see attached

= Total number of beneficiaries



C-3 Conditions for payment of the SAGES

This section explains the conditions under which the grant will be paid into an RESP.

1. In order for the SAGES to be paid, the beneficiary must be resident of Saskatchewan at the time a contribution to the RESP is made.
2. The SAGES may be paid only if the RESP has one beneficiary or, if there is more than one, all beneficiaries are siblings.
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 SAGES:
 - In any four years before the end of the calendar 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 calendar year in which the beneficiary turns 15, and not withdrawn.

C-4 Declaration and consent

You must read this section and sign to receive the grant in this RESP.

I authorize the RESP provider to ask the trustee to apply for the SAGES in respect of the beneficiaries.

I confirm that the beneficiaries are residents of Saskatchewan and I agree to inform the RESP provider if, at any time, there is a change in the beneficiaries' circumstances.

I authorize that the information related to this RESP be used for the purposes of administering the SAGES.

I understand that the *Privacy Act* (Canada) gives me (or my authorized representative) the right to access or request correction to my personal information and the beneficiaries' personal information (as applicable) kept in the government file.

I confirm that I have read and understood this document, including my privacy rights found in Section C-5, and I consent to the use and sharing of my personal information and the beneficiaries' personal information (as applicable).

Subscriber's signature

Date (yyyy/mm/dd)

Joint subscriber's signature (if applicable)

Date (yyyy/mm/dd)

To be completed only if different than the subscriber/joint subscriber

Custodial parent/legal guardian's signature

Date (yyyy/mm/dd)

Custodial parent/legal guardian's name (please print)



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Your privacy rights

The personal information you provide is collected under the authority of *The Saskatchewan Advantage Grant for Education Savings Act* (Government of Saskatchewan), *The Saskatchewan Advantage Grant for Education Savings Regulations* (Government of Saskatchewan) the *Department of Employment and Social Development Act* (Government of Canada), the *Canada Education Savings Act* (Government of Canada) and the *Income Tax Act* (Government of Canada) for the administration of the SAGES.

You are not obligated to provide any personal information. However, refusal to provide personal information will result in ESDC being unable to pay the SAGES to the trustee in respect of the RESP beneficiary.

The personal information you provide may be used by and shared between the following parties for the administration of *The Saskatchewan Advantage Grant for Education Savings Act* and the *Income Tax Act*: the Government of Saskatchewan, ESDC, the Canada Revenue Agency, the RESP provider and its agents, the trustee, and between RESP providers when transferring RESP assets.

Information may be shared with a third party contracted by ESDC for direct mailings. Information may be used for policy analysis, research, statistical and/or evaluation purposes. Information may also be disclosed to Statistics Canada for research and statistical purposes. However, these additional uses will never result in an administrative decision being made about you.

Once under the control of ESDC, the information is administered in accordance with the *Department of Employment and Social Development Act*, the *Canada Education Savings Act*, the *Privacy Act* and all other applicable laws.

You have the right to the protection of, and access to, your personal information. The personal information banks ESDC PPU 506 and ESDC PPU 390 describe the types of information held by ESDC for the administration of the SAGES by the Canada Education Savings Program. Instructions for obtaining this information are outlined in the government publication entitled Info Source, which is available at Canada.ca/infosource-ESDC. Info Source may also be accessed online at any Service Canada Centre.

You have the right to file a complaint with the Privacy Commissioner of Canada regarding the institution's handling of your personal information. Additional information is available at www.priv.gc.ca/en.

This section explains why your information is collected and how it is used, shared and protected. It also explains how you can access your personal information.

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Definitions

These definitions 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 *Income Tax Act* and the *Canada Education Savings Act* and *The Saskatchewan Advantage Grant for Education Savings Act* shall prevail.

Custodial parent/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.

RESP provider (also called promoter): Individual or organization offering an RESP to the public and who will open an RESP for the subscriber.

Saskatchewan Advantage Grant for Education Savings (SAGES): A payment of 10% on the \$2,500 of annual RESP contributions made on behalf of an eligible beneficiary, up until the end of the calendar year in which the beneficiary turns 17.

Subscriber: Individual or child care agency, who opens an RESP, names one or more beneficiaries and may deposit money (contributions) into the RESP.

Trustee: Financial organization that invests, administers, and distributes the money in the RESP for the beneficiary.

Where to get more information about the Saskatchewan Advantage Grant for Education Savings:

Phone: 1 888 276-3624 / 1 800 465-7735 for TTY users only
E-mail: cesp-pcee@hrsdcc-rhdcc.gc.ca
Internet: www.canada.ca/RESPresources