

RESP 'NON-EDUCATIONAL' WITHDRAWAL FORM



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This form is to request a withdrawal for non-educational purposes where the student is not currently attending post-secondary education (PSE) and is not expected to attend post-secondary education. If your beneficiary is not expected to attend post-secondary education, you do have other options to preserve your investment. Please visit us at knowledgefirstfinancial.ca or contact our Customer Service team to discuss your options.

1 PLAN INFORMATION		
RESP AGREEMENT NO(S).		
SUBSCRIBER 1 NAME	EMAIL	MAILING ADDRESS
SUBSCRIBER 2 NAME	EMAIL	STUDENT ADDRESS (IF DIFFERENT FROM SUBSCRIBER)
STUDENT NAME	EMAIL	
2 WITHDRAWAL AMOUNT		
<p>This is a non-taxable withdrawal of net contributions and can only be paid to the subscriber(s).</p> <p>Any government grants that were accumulated on those contributions will be forfeited and repaid to the applicable Federal or Provincial governments. If your contributions have attracted the Additional Canada Education Savings Grant (A-CESG), your beneficiary will not be eligible to receive A-CESG for the rest of the calendar year in which this withdrawal is processed and for the following two years. Your beneficiary will remain eligible for the basic CESG.</p> <p>Note: If direction of payment is not indicated or is incomplete, a cheque will be mailed to the refund recipient on file. A transaction fee will apply where a cheque is issued¹.</p>		
AGREEMENT NO.	AMOUNT	DIRECTION OF PAYMENT
	\$ _____ OR <input type="checkbox"/> 100% OF FUNDS	DIRECT DEPOSIT: <input type="checkbox"/> to a new account (attach pre-printed void cheque or bank form) <input type="checkbox"/> to your existing bank account on file ending in _____ CHEQUE: <input type="checkbox"/> payable to subscriber(s)
	\$ _____ OR <input type="checkbox"/> 100% OF FUNDS	DIRECT DEPOSIT: <input type="checkbox"/> to a new account (attach pre-printed void cheque or bank form) <input type="checkbox"/> to your existing bank account on file ending in _____ CHEQUE: <input type="checkbox"/> payable to subscriber(s)
	\$ _____ OR <input type="checkbox"/> 100% OF FUNDS	DIRECT DEPOSIT: <input type="checkbox"/> to a new account (attach pre-printed void cheque or bank form) <input type="checkbox"/> to your existing bank account on file ending in _____ CHEQUE: <input type="checkbox"/> payable to subscriber(s)
3 SUBSCRIBER ACKNOWLEDGEMENT AND AUTHORIZATION		
<p>By signing below, I/we acknowledge that:</p> <ul style="list-style-type: none"> This is a request of withdrawal of net contributions for non-educational purposes The government which administers the federal and/or provincial grants may impose a grant restriction for the beneficiary Any government grants that were accumulated on the withdrawal of contributions for non-educational purposes will be forfeited and repaid to the applicable Federal and/or Provincial governments If the remaining balance in the above-listed agreement(s) do not meet the minimum threshold, the plans may be subject to cancellation. <p>Where there are joint subscribers of an agreement(s), both subscriber signatures are required.</p>		
SUBSCRIBER 1 SIGNATURE	SUBSCRIBER 2 SIGNATURE (WHERE APPLICABLE)	DATE Y Y Y Y M M D D

¹Visit knowledgefirstfinancial.ca/fees