

This form is to be completed by the Subscriber(s) of a registered education savings plan (RESP) or for an education savings plan that shall be submitted for registration. One form must be completed for each beneficiary applying to receive the Alberta Centennial Education Savings Grant.

Beneficiary Information

| | | | |
|-------------|---------------|----------------------------|---|
| Family Name | Given Name(s) | Date of Birth (yyyy/mm/dd) | Gender <input type="checkbox"/> M <input type="checkbox"/> F |
|-------------|---------------|----------------------------|---|

By completing this form I(we) hereby authorize the Promoter to request the Trustee apply for the **Alberta Centennial Education Savings Grant** in respect of the Beneficiary.

Confirmation of Eligibility for the Alberta Centennial Education Savings Grant

I(we) understand a parent or legal guardian must be a resident in Alberta for the Grant to be paid into an RESP in respect of a Beneficiary.

I _____ declare I am a parent or legal guardian of the
PRINT name of parent or legal guardian
 Beneficiary named above and I am a resident of Alberta and have provided identification/proof of residency below,

OR

I confirm that a parent or legal guardian _____ of the
PRINT name of parent or legal guardian
 Beneficiary named above is a resident of Alberta and I have provided identification/proof of this person's residency below.

Proof of Residency

Address of parent or legal guardian

Type of identification provided

| | | |
|-----------------------------|----------------------------|------|
| PRINT name of Subscriber | Signature of Subscriber | Date |
| PRINT name of Co-Subscriber | Signature of Co-Subscriber | Date |

Notification of the Collection, Use and Disclosure of Personal Information

➔ Only the personal information necessary for the administration of the Alberta Centennial Education Savings Plan shall be collected by:

- (a) Alberta Advanced Education
- (b) Human Resources and Skills Development Canada, and the Canada Revenue Agency

and will be used for the purpose of administering the Plan.

This information is collected in accordance with the provisions of:

- Alberta's *Freedom of Information and Protection of Privacy Act*, R.S.A. chap. F-25,
- *Alberta Centennial Education Savings Plan Act*, S.A. 2004, c. A-14.7,
- *Alberta Centennial Education Savings Plan Regulation*, A.R. 248/2004, and
- Canada's *Income Tax Act*, R.S.C. 1985, c.1.

➔ I understand the personal information about the Beneficiary and the parent or legal guardian residing in Alberta, shall be shared with Alberta Advanced Education.

➔ Questions about the collection, use and disclosure of the information provided should be directed to: The Director, Alberta Centennial Education Savings Plan, P.O. Box 85, Edmonton, Alberta T5J 2G9, or send an email to: ACES@gov.ab.ca

| | |
|---|------|
| Signature of Beneficiary's Parent/Legal Guardian who is a resident of Alberta | Date |
| Signature of Beneficiary's Custodial Parent/Legal Guardian <i>(if different from above)</i> | Date |
| Signature of Subscriber <i>(if different from above)</i> | Date |

Definitions

In this application form, the following words have the following meanings:

"Alberta Centennial Education Savings Grant" means a grant payable under the *Alberta Centennial Education Savings Act*, S.A. 2004, c. A-14.7 and under the *Alberta Centennial Education Savings Plan Regulation*, *Alberta Regulation*, 248/2004.

"beneficiary" means a person designated by a subscriber, to whom or on whose behalf an educational assistance payment under a Registered Education Savings Plan (RESP) is agreed to be paid if the person qualifies under the RESP.

"custodial parent/legal guardian" means the person authorized by or pursuant to the law of Canada or a province to administer the affairs or estate of the beneficiary.

"educational assistance payment" means any amount, other than a refund of payments, paid out of an education savings plan to or for an individual to assist the individual to further the individual's education at a post-secondary level.

"education savings plan" means a contract made at any time between

- (a) either
 - (i) one individual (other than a trust), or
 - (ii) an individual (other than a trust) and the spouse or interdependent relationship partner of the individual, and
- (b) a person or organization (in this section referred to as a "promoter")

under which the promoter agrees to pay or to cause to be paid educational assistance payment to or for one or more beneficiaries.

"Registered Education Savings Plan" as defined in the *Income Tax Act*, R.S.C. 1985, c1.

"promoter" means the person or organization who agrees to pay or cause to be paid educational assistance payments to or for one or more beneficiaries.

"resident of Alberta" as defined in the *Alberta Centennial Education Savings Plan Act* means a person who is lawfully entitled to be or to remain in Canada and who makes the person's home, and is ordinarily present in Alberta.

"subscriber/co-subscriber" means a person who contributes to a Registered Education Savings Plan and has access to the Alberta Centennial Education Savings Grant.

"trustee" means a company incorporated under the laws of Canada to carry on in Canada the business of offering to the public its services as trustee.

These definitions may change based on changes to the *Income Tax Act*, the *Alberta Centennial Education Savings Act* and/or their related regulations.