

RESP non-financial update form

Mackenzie account no.

Subscriber's last name First name

Joint Subscriber's last name First name
 (if applicable)

Address and personal information update

<input type="checkbox"/> Address update (check one only) <input type="radio"/> All (Subscribers & Beneficiaries) <input type="radio"/> Subscribers only <input type="radio"/> Specific Subscriber Name _____	<input type="radio"/> Beneficiaries only <input type="radio"/> Specific beneficiary Name _____	Enter new address here:
<input type="checkbox"/> Personal information update <input type="radio"/> Subscriber <input type="radio"/> Primary Caregiver (PCG) <input type="radio"/> Beneficiary Name _____	<input type="radio"/> Name <input type="radio"/> Social insurance number <input type="radio"/> Date of birth <input type="radio"/> Gender	Enter change here:

Account information update

<input type="checkbox"/> Grant fund change	Fund number: _____	Fund name: _____
<input type="checkbox"/> Grant validation cancellation Effective immediately, cease grant validation requests for the: <input type="radio"/> Beneficiary – Name _____ <input type="radio"/> All beneficiaries	<input type="radio"/> Basic Canada Education Savings Grant (CESG) <input type="radio"/> Additional Canada Education Savings Grant (CESG) <input type="radio"/> Saskatchewan Advantage Grant for Education Savings (SAGES)	<input type="radio"/> Canada Learning Bond (CLB) <input type="radio"/> Quebec Education Savings Incentive (QESI) <input type="radio"/> British Columbia Training and Education Savings Grant (BCTESG)
<input type="checkbox"/> Contribution allocation standing instructions Effective immediately, allocate all future purchases based on this allocation	Beneficiary _____ _____ _____ _____	Percent allocation (%) _____ _____ _____ _____
<input type="checkbox"/> Contribution allocation current purchase Trade date _____ Purchase amount \$ _____	Beneficiary _____ _____ _____ _____	Percent allocation (%) _____ _____ _____ _____

Advisor name Dealer Advisor Code

Advisor signature Date
 Subscriber(s) signature not required