For Promoter Use Only

knowledgefirst FINANCIAL

Application for:

(Use this form to apply for one or more of the incentives shown at right)

☐ Basic Québec Education Savings Incentive

☐ Additional Québec Education Savings Incentive

Instructions:

Part A - Subscriber

1. Check the incentives you are applying for at the top of each of the three parts of this form. Please note that Part C – Primary Caregiver (pages 5 and 6) is not required if you apply only for the Basic Québec Education Savings Incentive
2. Read this document carefully. If you have any questions, do not hesitate to ask the Promoter.
3. **This form is valid only if completed, signed, dated and given to Knowledge First Financial Inc. Do not send directly to Revenu Québec.**
4. Please print clearly. Keep a copy for your records.

Subscriber
(Is this you? Please see explanation below)

Last Name | First Name

Social Insurance Number

| | | | | | | | | | |

Joint Subscriber
(If applicable - may be the Subscriber's spouse)

Last Name | First Name

Beneficiary
(Please see explanation below - **Enter name as on SIN card**)

Last Name | First Name

Date of Birth | Social Insurance Number

y y y y m m d d | | | | | | | | | |

Promoter
The Knowledge First Foundation

Name, Address, Postal Code

The Knowledge First Foundation /Knowledge First Financial Inc.
50 Burnhamthorpe Rd. West, Suite 1000, Mississauga, Ontario L5B 4A5

Agreement Number(s)

Explanation of Key Words *

Beneficiary- Individual who will receive money to help pay for his or her post-secondary education (e.g. college, university, or trade school), if he/she qualifies under the terms of the Registered Education Savings Plan (RESP).

Custodial Parent or 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.

Primary Caregiver - Individual who is eligible for the Canada Child Tax Benefit - sometimes called "family allowance or baby bonus" - and whose name appears on the Canada Child Tax Benefit annual Notice.

Promoter - Individual or organization offering an RESP to the public and who will open an RESP for the Subscriber, in this case, The International Scholarship Foundation.

Subscriber - Individual who opens an RESP, names one or more Beneficiaries and may deposit money (contributions) for them into the RESP.

Trustee - Financial organization that invests, administers and distributes the money in the RESP for the Beneficiary.

*** NOTE:** These explanations are provided for your information only. Legal definitions can be found in the Income Tax Act (Canada).

Your Privacy Rights

The Knowledge First Foundation protects the confidentiality of your personal information. We cannot give your personal information to any person or organization without your written consent, except where required by legislation or pursuant to the Education Assistance Agreement between you and The Knowledge First Foundation. You (or your authorized representative) have the right to request a copy of the information in your file.

Where to get more information about the Québec Education Savings Incentive:

Phone: 1-800-363-7377
E-Mail: contactus@kff.ca
Internet: www.knowledgefirst financial.ca or www.revenu.gouv.qc.ca

Ce formulaire est disponible en français

Part A - Subscriber (continued)

Conditions

1. In order for the Québec Education Savings Incentive to be paid, the Beneficiary must be less than 18 years old and a resident in Québec on December 31st of the year in which the applicable RESP contribution was made.

2. An Additional Québec Education Savings Incentive may be paid only if the RESP has one Beneficiary or, if there is more than one, every Beneficiary is a brother or sister of every other Beneficiary.

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 Québec Education Savings Incentive:

   - in any four years before the end of the 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 year in which the Beneficiary turns 15, and not withdrawn.
   - in the case of the year 2008, and if the Beneficiary is 17 years old in that year, an RESP must have existed at least 4 years prior to 2008.

Declaration and Consent of the Subscriber

I authorize the Promoter to apply for the Québec Education Savings Incentive in respect of the Beneficiary.

I confirm that the Beneficiary meets the residency requirements set out above and agree to inform theTrustee if, at any time, there is a change of residence.

I understand that my name and address will be shared with the Beneficiary or, if the Beneficiary is under the age of 19 years and resides with a parent, my name and information will be shared with that parent.

I understand that, if the legislative instrument that formally brings the Québec Education Savings Incentive into effect is not passed as currently written, my eligibility for the Québec Education Savings Incentive, or the availability of the Québec Education Savings Incentive itself, could be affected.

Subscriber's Signature	y y y y m m d d Date
Joint Subscriber's Signature (if applicable)	y y y y m m d d Date

Ce formulaire est disponible en français

knowledgefirst FINANCIAL

For Promoter Use Only

Application for:

(Use this form to apply for one or more of the incentives shown at right)

☐ Basic Québec Education Savings Incentive

☐ Additional Québec Education Savings Incentive

Part B - Custodial Parent or Legal Guardian, or Beneficiary aged 18 or older

Instructions:

1. You are asked to complete this form because an application has been made for the Basic Québec Education Savings Incentive either for you, the beneficiary aged 18 or older, or for the beneficiary for whom you are the Custodial Parent or Legal Guardian.
2. Read this document carefully. If you have any questions, do not hesitate to ask the Promoter.
3. **This form is valid only if completed, signed, dated and given to Knowledge First Financial Inc. Do not send directly to Revenu Québec.**
4. Please print clearly. Keep a copy for your records.

Custodial Parent or Legal Guardian (Is this you? Please see explanation below)	Last Name	First Name
	Social Insurance Number | | | | | | | | | |	
Beneficiary (Please see explanation below - **Enter name as on SIN card**)	Last Name	First Name
	Date of Birth | y | y | y | y | m | m | d | d |	Social Insurance Number | | | | | | | | | |
Promoter The Knowledge First Foundation	Name, Address, Postal Code The International Scholarship Foundation /Knowledge First Financial Inc. 50 Burnhamthorpe Rd. West, Suite 1000, Mississauga, Ontario L5B 4A5	
	Agreement Number(s)	

Explanation of Key Words *

Beneficiary- Individual who will receive money to help pay for his or her post-secondary education (e.g. college, university, or trade school), if he/she qualifies under the terms of the Registered Education Savings Plan (RESP).

Custodial Parent or 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.

Primary Caregiver - Individual who is eligible for the Canada Child Tax Benefit - sometimes called "family allowance or baby bonus" - and whose name appears on the Canada Child Tax Benefit annual Notice.

Promoter - Individual or organization offering an RESP to the public and who will open an RESP for the Subscriber, in this case, The International Scholarship Foundation.

Subscriber - Individual who opens an RESP, names one or more Beneficiaries and may deposit money (contributions) for them into the RESP.

Trustee - Financial organization that invests, administers and distributes the money in the RESP for the Beneficiary.

*** NOTE:** These explanations are provided for your information only. Legal definitions can be found in the Income Tax Act (Canada).

Your Privacy Rights

The Knowledge First Foundation protects the confidentiality of your personal information. We cannot give your personal information to any person or organization without your written consent, except where required by legislation or pursuant to the Education Assistance Agreement between you and The Knowledge First Foundation. You (or your authorized representative) have the right to request a copy of the information in your file.

Where to get more information about the Québec Education Savings Incentive:

Phone: 1-800-363-7377
E-Mail: contactus@kff.ca
Internet: www.knowledgefirst financial.ca or www.revenu.gouv.qc.ca

Ce formulaire est disponible en français

knowledgefirst FINANCIAL

Part B - Custodial Parent or Legal Guardian, or Beneficiary aged 18 or older (continued)

Sharing of your Personal Information

I understand that:

1. The Subscriber intends to open a RESP with the Promoter that will have the Promoter pay or cause to be paid Educational Assistance Payments out of the RESP for the Beneficiary.

2. The Subscriber has requested that a payment of the Québec Education Savings Incentive be paid into the RESP in the respect of the Beneficiary.

Declaration and Consent of the Custodial Parent or Legal Guardian, or Beneficiary aged 18 or Older

I confirm that I am the Custodial Parent or Legal Guardian of the Beneficiary, or that I am the Beneficiary and am aged 18 or older.

I consent to the use and sharing of the Beneficiary's personal information with Revenu Québec.

I understand that, if the legislative instrument that formally brings the Québec Education Savings Incentive into effect is not passed as currently written, my eligibility for the Québec Education Savings Incentive, or the availability of the Québec Education Savings Incentive itself, could be affected.

_____

Signature of the Custodial Parent or Legal Guardian,
or of Beneficiary aged 18 or older

| y | y | y | y | m | m | d | d |

Date

Ce formulaire est disponible en français

knowledgefirst FINANCIAL

For Promoter Use Only

Application for:

(Use this form to apply for one or more of the incentives shown at right)

☐ Basic Québec Education Savings Incentive

☐ Additional Québec Education Savings Incentive

Part C - Primary Caregiver

(This Part Not Required if Applying Only for the Basic Québec Education Savings Incentive)

Instructions:

1. You are asked to complete this form because an application has been made for the incentives indicated above in respect of the Beneficiary identified below.
2. Read this document carefully. If you have any questions, do not hesitate to ask the Promoter.
3. **This form is valid only if completed, signed, dated and given to Knowledge First Financial Inc. Do not send directly to Revenu Québec.**
4. Please print clearly. Keep a copy for your records.

Primary Caregiver (Is this you? Please see explanation below)	Last Name	First Name
	Social Insurance Number	
Beneficiary (Please see explanation below - **Enter name as on SIN card**)	Last Name	First Name
	Date of Birth	Social Insurance Number
	y y y y m m d d	
Promoter The Knowledge First Foundation	Name, Address, Postal Code	
	The Knowledge First Foundation /Knowledge First Financial Inc. 50 Burnhamthorpe Rd. West, Suite 1000, Mississauga, Ontario L5B 4A5	
	Agreement Number(s)	

Explanation of Key Words *

Beneficiary- Individual who will receive money to help pay for his or her post-secondary education (e.g. college, university, or trade school), if he/she qualifies under the terms of the Registered Education Savings Plan (RESP).

Custodial Parent or 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.

Primary Caregiver - Individual who is eligible for the Canada Child Tax Benefit - sometimes called "family allowance or baby bonus" - and whose name appears on the Canada Child Tax Benefit annual Notice.

Promoter - Individual or organization offering an RESP to the public and who will open an RESP for the Subscriber, in this case, The International Scholarship Foundation.

Subscriber - Individual who opens an RESP, names one or more Beneficiaries and may deposit money (contributions) for them into the RESP.

Trustee - Financial organization that invests, administers and distributes the money in the RESP for the Beneficiary.

*** NOTE:** These explanations are provided for your information only. Legal definitions can be found in the Income Tax Act (Canada).

Your Privacy Rights

The Knowledge First Foundation protects the confidentiality of your personal information. We cannot give your personal information to any person or organization without your written consent, except where required by legislation or pursuant to the Education Assistance Agreement between you and The Knowledge First Foundation. You (or your authorized representative) have the right to request a copy of the information in your file.

Where to get more information about the Québec Education Savings Incentive:

Phone: 1-800-363-7377
E-Mail: contactus@kff.ca
Internet: www.knowledgefirst financial.ca or www.revenu.gouv.qc.ca

Ce formulaire est disponible en français

knowledgefirst FINANCIAL

Part C - Primary Caregiver (continued)

Sharing of your Personal Information

I understand that:

1. The Subscriber intends to open a RESP with the Promoter that will have the Promoter pay or cause to be paid Educational Assistance Payments out of the RESP for the Beneficiary.

2. The Subscriber has requested that a payment of the Québec Education Savings Incentive be paid into the RESP in the respect of the Beneficiary.

Declaration and Consent of the Primary Caregiver

I confirm that I am the Primary Caregiver or the Public Primary Caregiver's authorized representative of the Beneficiary.

I understand that in order for the Québec Education Savings Incentive to be increased (i.e. Additional Québec Education Savings Incentive), my adjusted family income will be verified by the government and I authorize this verification to occur.

I understand that, if the legislative instrument that formally brings the Québec Education Savings Incentive into effect is not passed as currently written, my eligibility for the Québec Education Savings Incentive, or the availability of the Québec Education Savings Incentive itself, could be affected.

_____ | y | y | y | y | m | m | d | d |

Signature of the Primary Caregiver Date

Ce formulaire est disponible en français

knowledgefirst FINANCIAL