

Family Group Plan Transfer Request

To TRANSFER your Family Group Plan to a Family Single Student Plan (not applicable on Classic Plans), please complete the transfer request below. You can transfer before your Family Group Plan matures. To learn more, visit our website at knowledgefirstfinancial.ca

50 Burnhamthorpe Rd W., Suite 1000
Mississauga, Ontario L5B 4A5
Toll-free: 1 800 363-7377
Email: contact@kff.ca
Fax: 1 800 668-5007

RESP AGREEMENT NUMBER:		
1 SUBSCRIBER INFORMATION		
(Mr./Mrs./Ms) SUBSCRIBER 1 NAME		RELATIONSHIP TO BENEFICIARY
SOCIAL INSURANCE NUMBER AS CURRENTLY ON FILE		
EMAIL	HOME PHONE	MAILING ADDRESS AS CURRENTLY ON FILE
(Mr./Mrs./Ms) SUBSCRIBER 2 NAME		RELATIONSHIP TO BENEFICIARY
SOCIAL INSURANCE NUMBER AS CURRENTLY ON FILE		
EMAIL	HOME PHONE	MAILING ADDRESS AS CURRENTLY ON FILE
2 BENEFICIARY INFORMATION		
BENEFICIARY NAME		DATE OF BIRTH AS CURRENTLY ON FILE
SOCIAL INSURANCE NUMBER AS CURRENTLY ON FILE		
EMAIL	MAILING ADDRESS IF DIFFERENT FROM SUBSCRIBER	
NAME AND ADDRESS FOR THE CUSTODIAL PARENT (if not the subscriber) OR PUBLIC PRIMARY CAREGIVER		
<input checked="" type="checkbox"/> The beneficiary named above is common to both RESPs, or <input type="checkbox"/> The beneficiary named above is the brother or sister of a beneficiary named under the relinquishing RESP, and the receiving RESP is: <input type="checkbox"/> a family RESP; or <input type="checkbox"/> an individual RESP where the beneficiary was named before he/she was 21 years old. <input type="checkbox"/> Neither of the above. (If you tick this box, the Canada Education Savings Grant (CESG), Canada Learning Bond (CLB), and designated provincial grants may have to be repaid and you may be in an over contribution situation for tax purposes.) Note that for CLB to transfer, the beneficiary must be common to both RESPs.		
3 FAMILY GROUP PLAN TRANSFER INFORMATION		
Your funds, which include your net contributions, enrolment sales charge, plan income, government grants, and grant income, will be transferred to the Family Single Student Plan.		
Transferring to a Family Single Student Plan may: · Make it easier for your beneficiary to receive their Education Assistance Payments (EAPs) in a lump sum payment · Allow you to withdraw income that may not be available for EAPs · Provide the flexibility to transfer your Registered Education Savings Plan (RESP) to a Registered Retirement Savings Plan (RRSP)		
Important: · The EAP payout differs between the Family Group Plan and Family Single Student Plan: The Family Single Student Plan does not include pooled income equivalent to the amount of sales charges paid or discretionary top-ups from the Knowledge First Foundation. · Once you have transferred from the Family Group Plan to the Family Single Student Plan, you cannot transfer back to the Family Group Plan.		
4 TRANSFER AUTHORIZATION		
I/We request a transfer from the Family Group Plan on the agreement noted above to the Family Single Student Plan.		
By signing this transfer request, the Subscriber requests that Knowledge First Foundation apply for registration for this Education Assistance Agreement under section 146.1 of the Income Tax Act (Canada) and is aware that, (1) no contributions may be made into this education savings plan at a time when the beneficiary identified is not a Canadian resident and (2) no contributions may be made into a Plan after the 31st year following the year the Plan was entered into and (3) the plan must be closed after the 35th year following the year the Plan was entered into and (4) Section 204.9 of the Income Tax Act (Canada) requires that the Subscriber pay tax on excess contributions to RESPs on behalf of each beneficiary.		
SUBSCRIBER 1 SIGNATURE	SUBSCRIBER 2 SIGNATURE	DATE Y Y Y Y M M D D
If two subscribers, both signatures are required.		
HEAD OFFICE USE ONLY		NEW AGREEMENT NUMBER:
LICENSED REPRESENTATIVE NAME:	LICENSED REPRESENTATIVE SIGNATURE:	SIGNATURE DATE: Y Y Y Y M M D D
TRADE REVIEWER NAME:	APPROVAL DATE: Y Y Y Y M M D D	IS THE CURRENT AGREEMENT WITHIN 24 MONTHS OF MATURITY? <input type="checkbox"/> YES <input type="checkbox"/> NO