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FINANCIAL



MATURITY AUTHORIZATION FORM

Heritage Contract Number _____ (the “Plan”)

This form is to be completed and signed by the subscriber(s) who is/are the owner(s) of the Plan. If the Plan is jointly owned, both subscribers must sign this authorization form to proceed with any **one** of the following requests:

- (i) to re-direct the payment of the contributions less fees, (also known as “Principal”) to an account belonging to one subscriber only; or
- (ii) to re-direct the payment of the Principal to an account belonging to the beneficiary (who is the student registered/enrolled in a post-secondary institution) of the Plan.

The subscriber or beneficiary of whom the payment is re-directed to is referred to as the “Recipient”.

Important instructions for completing this Authorization Form:

1. Provide contact information of the Recipient. The email address is used to send the confirmation of payment electronically.
2. A pre-printed void cheque bearing the Recipient’s name **must** be submitted along with this authorization form.
3. Sign and date the form and return to us for processing.

Please issue payment to _____
PLEASE PRINT RECIPIENT’S FIRST AND LAST NAME

Address _____

Telephone No.: _____ Email address: _____

I/We, _____ and _____
PRIMARY SUBSCRIBER’S FIRST AND LAST NAME (if applicable) **JOINT SUBSCRIBER’S FIRST AND LAST NAME**
request the refund of my/our Principal be deposited to the account of the Recipient as indicated above. A pre-printed void cheque (or a Pre-Authorized Debit Form) from a Canadian Financial Institution bearing the Recipient’s name is enclosed with this authorization form. I understand that failure to provide the requested information and/or documentation will delay processing the requested payment. If a valid void cheque or a Pre-Authorized Debit Form is not provided, **a fee of \$20.00 plus applicable taxes will be deducted from the payment.**

Primary Subscriber’s signature

Date

Primary Subscriber’s printed name

Joint Subscriber’s signature

Date

Joint Subscriber’s printed name