BMO InvestorLine®

RESP Withdrawal: Capital Withdrawal / Education Assistance Payment (EAP)

Identification

Date (YY/MM/DD) | Phone Number (area code, no.) | Account Number

Subscriber's Last Name | Subscriber's First Name

Complete if applicable:

Co-subscriber's Last Name | Co-subscriber's First Name

A — Withdrawal details

Please check appropriate box.

☐ Capital Withdrawal (Subscriber)

$

Complete Sections C or D, and E
Issued to subscriber
Method of payment – either cash or in-kind (sufficient cash/assets required)
(20% of the CES Grant balance will be returned if this is selected)

☐ Capital Withdrawal (Beneficiary)

$

Complete Sections B or C, and E
Issued to beneficiary – cash only (sufficient cash required)
(Proof of Enrollment is required)

☐ Education Assistance Payment

$

Complete Sections B, C and E
Issued to beneficiary – (T4A will be issued to the beneficiary for this amount)
Method of payment – cash only (sufficient cash required)
(Proof of Enrollment is required. Receipts required once EAP exceeds $20,000.)

B — Education Assistance Payment Information

Provide information about **beneficiary**:

Title | Last Name | First Name

Home Address (number, street) | Suite No.

City or Town | Prov. | Postal Code

SIN | Name of Educational Institution

Course Name | Course Length (in weeks)

Student I.D. | Current Year Enrolled | Start Date (YY/MM/DD)

**** ATTACH PROOF OF ENROLLMENT AND RECEIPTS ****
NOTE: Proof must indicate above information. If a tuition statement is provided, proof of payment must be shown on the statement. If there is no proof of payment, the tuition amount will be paid directly to the school.

C — Deposit details

Please check the appropriate box:

☐ Subscriber's/Co-subscriber's/Beneficiary's non-registered account number

☐ Subscriber's/Co-subscriber's/Beneficiary's bank account number

Bank | Transit | Account

NOTE: Cheques cannot be issued directly from a RESP account. Any such requests will be returned to the sender.

D — Securities

For in-kind payments please complete the table below:

Quantity	Description	Security Code	Price / Share	Total Value

NOTE: Please consult with one of our agents if you do not know the Security Code.

E — Authorization

I authorize BMO InvestorLine Inc. to process the above withdrawal from my Plan and I am fully aware of the following:

- Any withdrawals made from capital where there is still CES Grants remaining in the plan and Proof of Enrollment is not provided will result in the return of 20% of the remaining grant balance.
- The full EAP balance requested will be taxable in the hands of the beneficiary.
- If there is not enough income remaining in this account to satisfy the request, the remainder will be taken from the capital portion.

Subscriber Signature | *Date (YY/MM/DD)*

Co-subscriber Signature | *Date (YY/MM/DD)*

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