

# RESP WITHDRAWAL FORM

## Part I - General Information:

RESP Account:  Date:  /  /   
MM DD YY

Account Name:

### Delivery Instructions:

To Non Plan Account:

Mail Cheque (to account address).

Other:

## Part II - Type of Withdrawal Requested: *(Check one only)*

Contribution Refund (PSE).

EAP

Post Secondary Education Payments

Educational Assistance Payment (T4A)

Account: \_\_\_\_\_ Beneficiary No.: \_\_\_\_\_ Amount: \_\_\_\_\_

PSE length: \_\_\_\_\_ PSE type: \_\_\_\_\_ PSE year: \_\_\_\_\_  
(Length of program in years) (Type of program i.e. University) (Current year of study)

School Postal Code: \_\_\_\_\_ Start Date: \_\_\_\_\_ Academic year length: \_\_\_\_\_  
(Length of program in months)

Validation documentation attached: Yes  No

Client Signature: \_\_\_\_\_ (All Payments to Beneficiary)

AIP

AIP Transfer to an RRSP

*(Complete a RSP Transfer form)*

Accumulated Income Payment: (T4A)

Account: \_\_\_\_\_ Partial Amount: \_\_\_\_\_ Full:

All beneficiaries are over 21: Yes  Plan has been opened at least 10 years: Yes

Subscriber is a Canadian Resident: Yes  20% tax will be applied (12% in Quebec): Yes

All grants in account will be repaid at source to HRDC: Yes

Note: Any grants in the RESP will be repaid to HRDC at the time of the AIP payment. All requirements above must be met to qualify for this type of withdrawal. When an AIP is complete the account should be closed by the end of February of the following year.

Client Signature: \_\_\_\_\_ (All payments to Subscriber or Estate)

Capital Withdrawal:

Account: \_\_\_\_\_

Amount: \_\_\_\_\_

(Withdrawal of contributions for non-education purposes)

Grant refund of 20% or maximum grant remaining in account will be paid back at source: Yes

Note: Amount can not be greater than the total contributions made to the account.  
This is a withdrawal of contributions for non-education purposes.

Client Signature: \_\_\_\_\_