BMO InvestorLine®

Making money make sense®

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)
(Portion of CESG and/or QESI balance will be returned if this is selected)

☐ Capital Withdrawal (Beneficiary)

$

Complete Sections B, 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

Country of Residence | SIN

Name of Educational Institution | Program Length (in years)

Course Name | Course Load (Full-time or Part-time)

Student I.D. | Current Year of Program (1st, 2nd, 3rd, etc) | Start Date (YY/MM/DD)

**** ATTACH PROOF OF ENROLLMENT AND RECEIPTS ****

PROOF OF ENROLLMENT:

Official documentation should use the educational institution's letterhead or be readily identifiable as a document reproduced from the institution's secure student web site. The document may take the form of an enrollment letter, course confirmation, receipted invoice, or a combination of these documents. The proof must include the following information:

- Name of the beneficiary and student ID number
- Name of qualified educational program
- Session (Fall, Winter, Summer)
- The student status (Full-time or Part-time)

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. Letters of acceptance or offers of admission is not acceptable for proof of enrollment.

C — Deposit details

Please check the appropriate box:

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

☐ Subscriber's/Co-subscriber's/Beneficiary's BMO 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.

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BMO InvestorLine Inc. is a wholly owned subsidary of Bank of Montreal Holding Inc. Member – Canadian Investor Protection Fund and IIROC. (06/08/12)

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 CESG and/or QESI remaining in the plan and Proof of Enrollment is not provided will result in the return of a portion of the remainder of the government incentives.
- 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 (if applicable)* — *Date (YY/MM/DD)*