

FORM COMPLETION GUIDE

In order to process an RDP withdrawal, we must receive the form on page 2 fully completed and signed. This guide will tell you, by completing it, if however you have any questions or concerns write your own comments where you are completing it, please don't hesitate to contact one of our Client Services Specialists at 1-800-485-8238 or email service@iaa.com.

Each page completed here is your own work.

Notes

1801 University Ave. W.
St. Paul, MN 55105
Customer Service
1-800-485-8238
Fax: 612-683-8237
service@iaa.com

Branch

321 University Ave., Suite 400
St. Paul, MN 55105
Fax: 612-683-8237
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Reference

1740 University Ave.
St. Paul, MN
Reference ID: 100-100
Fax: 612-683-8237
service@iaa.com

Request to Withdraw Funds from a Registered Education Savings Plan for Educational Purposes

Receipt of form

Subscriber → Student or the student's

Beneficiary → Student who is named in the RDP using the educational withdrawal

Other Information

The federal government requires us to collect this information to make funds out of the plan for the beneficiary as reported in your contract. Please complete all items.

Withdrawal Information

An RDP withdrawal is either from one or both of the following categories:

Withdrawal of	Source(s)	Withdrawal limits	The implications
Grants and awards	Educator Assistance Payment (EAP)	High-line students maximum: \$2,000 every four months of enrollment Low-line students maximum: \$1,000 (single) five months of enrollment	Registration of other income: the withdrawal is 100% and Student's (or Student's partner's) net income is not RDP beneficiary for the RDP amount included in the withdrawal
Contributions	Post Secondary Education (PSE) withdrawal	No withdrawal limit	Not an indication for a PSE withdrawal since a RDP contribution is not tax deductible

Withdrawal amount

Please indicate the total amount you wish to receive under this withdrawal on the form. This will include the withdrawal from grants and awards (EAP) first, and any remainder will be taken from contributions (PSE). If you wish to specify the proportion of EAP and PSE in the withdrawal, complete the written request on optional on the right.

Source of withdrawal

The option applies to the financial contracts. Please specify from which financial contract you wish the withdrawal to be paid (provided you use My Client Space page for current fund withdrawal). If you prefer not to choose, you can check the box marked "Preferential" funds will be withdrawn from each of your funds in proportion to their market value.

Payment Information

Please indicate who the withdrawal is payable to: the subscriber, the beneficiary, or a contribution of both. If a direct deposit, please ensure that the name you printed on the right (cheque) corresponds to the name on file. If cheque is printed on the left (cheque you provide to us, the default option) cheque will be sent instead of direct deposit.

Verification of Withdrawal

For an educational withdrawal, you require proof that the beneficiary is **enrolled** in a post-secondary school. Enrollment can be for a semester or opening, session, or one full year within the past 12 months. The enrollee can be completed by the **school registrar's office**. If you are unable to have the school complete the enrollee, provide documentation which meets the below criteria: please note that a letter of acceptance is not a valid verification of enrollment.

Required RDP withdrawal verification	Examples of Evidence
- Acceptance letter - Post secondary school name - Date when proof was issued	- Enrollment in school year - Institution has RDP funding is verified - After past year?
	- Registrar's letter of enrollment - Cheque or receipt of payment - No cash - Transferable financial statements for its students