



ANNEX B – Primary Caregiver

APPLICATION: Canada Disability Savings Grant and/or Canada Disability Savings Bond

Instructions:

1. This form is to be used to determine whether the designated beneficiary is eligible to receive payments for the Canada Disability Savings Grant and/ or the Canada Disability Savings Bond, to calculate amounts payable and to administer the grant and bond for the years in which the designated beneficiary is or was 18 years of age or under.
2. Complete this form if the beneficiary is 18 years of age or under at the time of the application or was 18 years or under during any part of the ten-year period prior to the application, if the beneficiary was eligible for the Disability Tax Credit for any of those years.
3. A separate form is to be completed for each primary caregiver.
4. The personal information of the primary caregiver from previous years is used to determine if the beneficiary is entitled to any grant or bond from those years. **All** primary caregivers for **each** of these years will need to complete an Annex B.
5. Read this document carefully. If you have any questions, do not hesitate to ask the Registered Disability Savings Plan (RDSP) issuer.
6. This form is valid only if completed, signed (or consent is provided to the issuer in an accepted manner), dated and given to the issuer. **Do NOT send directly to Employment and Social Development Canada.** Keep a copy for your records.

Beneficiary's Last Name	Beneficiary's First Name	Beneficiary's Middle Name	RDSP Contract No.
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

B-1 Information about the Primary Caregiver

Complete this section if:

- you **are/ were** a primary caregiver of the beneficiary; or
- you **are/ were** representing an agency in the case where the beneficiary is/ was a child in care and a payment under the *Children's Special Allowances Act* was made in at least one month in the calendar year for any year that the beneficiary was 18 years or younger within the last ten years.

Primary Caregiver

You are a **primary caregiver** if you are/ were the person eligible for the Canada Child Benefit (CCB) and whose name appears on the CCB payments.

For more information please refer to B-4.

The name must be entered exactly as it appears on Social Insurance Number or Business Number documentation.

Last Name	First Name	Middle Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

Name of Agency	Name of Agency Representative
<input type="text"/>	<input type="text"/>

Social Insurance Number / Business Number (if an Agency)

Note: the Social Insurance Number contains nine digits (999 999 999) and the Business Number contains fifteen alphanumeric characters (999 999 999 TX 9999)

B-2 Declaration and Consent of the Primary Caregiver

Complete this section if you are an individual not representing an agency.

You must read this section and sign (or provide consent in an accepted manner), in order for the beneficiary's RDSP to receive grants and bonds

I confirm that the designated beneficiary listed above meets all eligibility criteria identified in Section 5.1 of the Application form for the Canada Disability Savings Grant and/or Canada Disability Savings Bond, and I agree to inform the issuer if, at any time, there is a change in the beneficiary's circumstances.

I confirm that I have read, and understood this document, including my privacy rights found in Section B-4, I have received a copy of this document, and I consent to the use and sharing of my personal information. I certify that the information provided on this form is accurate to the best of my knowledge.

Date (YYYY-MM-DD)	Primary Caregiver's Signature
<input type="text"/>	<input type="text"/>

B-3 Agency Attestation

Complete this section if you are representing the agency that received a payment made under the *Children's Special Allowances Act* in respect of the beneficiary in at least one month in the calendar year(s).

If applicable, this attestation must be completed in order for the beneficiary's RDSP to receive grants and bonds.

I confirm that the agency identified above was issued a payment under the *Children's Special Allowances Act* in the current calendar year, or if applicable, in the previous calendar year(s) [please specify]:

Date (YYYY-MM-DD)	Signature of Agency Representative
<input type="text"/>	<input type="text"/>

B-4**Your Privacy Rights**

This section explains why your information is collected and how it is used, shared and protected. It also explains how you can access your personal information.

The use of the singular (such as primary caregiver) also includes plural as the context requires.

The personal information you provide on this form is collected under the authority of the *Department of Employment and Social Development Act* (DESDA), the *Canada Disability Savings Act* (CDSA) and the *Income Tax Act* (ITA) for the purposes of determining eligibility for a Canada Disability Savings Grant (grant) or Canada Disability Savings Bond (bond) for the current year (if applicable) and if there are any unused grant and/or bond entitlements from prior years, to calculate amounts payable and to administer the grant and bond including for the years in which the beneficiary is or was 18 years of age or under. Information may be used by and shared between Employment and Social Development Canada (ESDC), the Canada Revenue Agency (CRA), and the issuer for the administration of the CDSA and the ITA.

The Social Insurance Number (SIN) is collected under the authority of the CDSA and the ITA in accordance with the Treasury Board Secretariat Directive on Social Insurance Number. The SIN will be used as a file identifier and to ensure an individual's exact identification so that the beneficiary's eligibility for the Disability Tax Credit (DTC), residency and family income can be verified for the purposes of determining whether a grant or a bond may be paid. While eligibility for the DTC may be verified, information contained within the Disability Tax Credit Certificate (i.e., the nature of the beneficiary's disability) will not be collected, used nor disclosed.

Personal information on the primary caregiver is used to verify their identity in the Social Insurance Registry in order to determine the correct RDSP and for the purposes of determining the amount of grant and/or bond for the years in which the beneficiary is/was 18 years of age or under.

Personal information on the primary caregiver is also used to determine the family income for a particular year, as well as to validate the beneficiary's residency and eligibility for the DTC. Family income for any given year is based on taxpayer information submitted two years prior (for example, family income for determining 2020 bond entitlement is based on the 2018 tax year). Your taxpayer information held by the CRA is used to determine the family income as well as validate the beneficiary's Disability Tax Credit eligibility and the beneficiary's residency.

As the beneficiary may be eligible for unused grant and bond entitlements from the previous ten years, the personal and taxpayer information of the primary caregiver is used to determine eligibility for any year in which the beneficiary was 18 years of age or under. As a result, the use and sharing of personal and taxpayer information may extend as far back as twelve years (the previous ten years for unused grant and bond entitlements, plus two years prior for family income based on income tax records).

Though you, as a primary caregiver who does not represent an agency, are not obligated to provide any personal information, refusal to do so, may result in ESDC being unable to determine eligibility for the full amount of grant or bond in respect of the beneficiary.

The personal information you provide may be used by and shared between the following parties for the administration of the CDSA and the ITA: ESDC, the CRA, the RDSP provider and its agents, and between RDSP providers when transferring RDSP assets.

Information may be used and/or disclosed by ESDC for policy analysis, research and/or evaluation purposes. Information may also be disclosed to Statistics Canada for research and statistical purposes. However, these additional uses and/or disclosures of your personal information will never result in an administrative decision being made, (such as a decision on the beneficiary's entitlement to a grant and/or a bond).

Once under the control of ESDC, your personal information is administered in accordance with the DESDA, the ITA, the CDSA, the Privacy Act, and all other applicable laws. You have the right to access and request correction to, your personal information, which is described in Personal Information Bank "ESDC PPU 038". Instructions for obtaining this information are outlined in the government publication entitled *Info Source*, which is available at Canada.ca/infosource-ESDC. *Info Source* may also be accessed online at any Service Canada Centre. You have the right to file a complaint with the Privacy Commissioner of Canada if you have concerns about the handling of your personal information.

B-5**Definitions**

Beneficiary: The individual who will receive payments from the RDSP.

Disability Tax Credit (DTC): A non-refundable tax credit available to individuals who, in a given taxation year, have one or more severe and prolonged impairments in physical or mental functions. A medical practitioner, using the appropriate form, must certify the effects of the impairment and the Canada Revenue Agency must approve the application. See the *Income Tax Act*, section 118.3 for further details.

Family Income: Family income is used to determine the amount of grant and bond a beneficiary is eligible for and is generally established from the information of the primary caregiver who received the first Canada Child Benefit (CCB) payment of the year (usually in January). There are circumstances where the information of the primary caregiver who is currently receiving the CCB is used instead (if this is different from the primary caregiver who received the CCTB for January) – please identify both individuals if this applies. ESDC uses the family income that is most beneficial to the beneficiary to determine the amount of grant and bond.

Holder: Is an individual, agency, department or institution that opens an RDSP, names a beneficiary and may authorize or make deposits (contributions) on behalf of the designated beneficiary into the RDSP. The plan holder may be the beneficiary provided the beneficiary is of the age of majority and has legal capacity to sign (or provide consent in an accepted manner to the issuer) for themselves.

Issuer: A corporation authorized to offer the RDSP to the public. The issuer opens an RDSP for the holder on behalf of a designated beneficiary and handles related administrative matters.

Primary Caregiver: For the purpose of the grant and bond, the primary caregiver is/ are the person(s) eligible for the Canada Child Benefit (CCB) and whose name appears on the CCB payments. Alternately, it is the department, agency or institution that receives the allowance payable under the *Children's Special Allowances Act*. In cases of joint custody or a change in custody, there may be more than one primary caregiver for any given year(s) or part thereof. Similarly, there may be circumstances where the beneficiary was in the care of a department, agency, or institution for any given year(s) or part thereof.

These definitions are provided for your information only and do not constitute legal definitions.

In the event of a discrepancy, the legal definitions found in the *Canada Disability Savings Act*, and the *Income Tax Act* prevail.

Where to get more information about the Canada Disability Savings Grant and Canada Disability Savings Bond:

Phone: 1 800 O Canada (1 800 622-6232); 1-800-926-9105 (TTY)
E-mail: rdsp-reei@hrsdc-rhdcc.gc.ca Internet: www.canada.ca/rdsp

Ce formulaire est disponible en français
This form is available in alternate formats