

## Dealer Relations

# Updates to RESP and RDSP applications and forms



As we communicated earlier in our [winter newsletter](#), Mackenzie has updated its applications for RESPs and RDSPs to align with Employment and Social Development Canada (ESDC) data collection practices. ESDC now collects gender instead of sex and has added a non-binary gender option.

## Updated ESDC forms

The following RESP forms have been updated to reflect the new gender option:

### Grant applications (mandatory as of May 1, 2024)

- Application: Canada Education Savings Grant (CESG) and Canada Learning Bond (CLB) – SDE 0093
  - Annex A: Additional Beneficiaries – SDE 0093-A
  - Annex B: Primary Caregiver or their spouse and/or Custodial Parent/Legal Guardian – SDE 0093-B
  - Annex D: Application British Columbia Training and Education Savings Grant (BCTESG) – SDE 0093-D
- Canada Learning Bond (CLB) Application for Adult Beneficiaries – SDE 0107

### Transfer forms (mandatory as of May 1, 2024)

- RESP transfer form & applicable annexes
  - Part A: Subscriber Request – SDE 0100 Part A
  - Annex 1: Additional Beneficiaries – SDE 0100 Annex 1
  - Part B: Receiving Promoter – SDE 0100 Part B
  - Part C: Relinquishing Promoter – SDE 0100 Part C

You can also refer to the [ESDC website](#) and select the “Forms” tab for more information.

Please note, there are no changes to RDSP forms related to the Canada Disability Savings Grant and Bond, as those forms don't collect sex or gender data for beneficiaries or holders.

## Timelines for use

<b>Updated ESDC forms and grant applications for RESP (dated 2023-05)</b>	These are mandatory as of <b>May 1, 2024</b> . Older versions of the form will be rejected after that date, and requests will need to be resubmitted using the updated versions.
<b>Mackenzie RESP &amp; RDSP applications</b>	Mackenzie will continue to accept the previous versions of our RESP and RDSP applications until June 28, 2024.

You can find updated applications, including ESDC grant applications, on the [Mackenzie Investments website](#).

You can find updated ESDC grant applications and Mackenzie's RDSP applications on [our website](#). We expect updated RESP applications to be available shortly.

## Quebec Education Savings Incentive (QESI)

Please note that if no gender option is selected on the Mackenzie RESP application, the plan will not be eligible to receive QESI.

## Questions?

If you have questions or need additional information, please contact your Dealer Relations Account Manager directly or send an email to [drelations@mackenzieinvestments.com](mailto:drelations@mackenzieinvestments.com).

## Thank you for your continued support of Mackenzie Investments.

The Dealer Relations Team

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