

Dealer Relations

Creating a better RESP experience

With students heading back to school in the next few months, we’ve made some enhancements to our RESP resources to better support you and your advisors. The changes are designed to reduce pain points and make it easier for advisors to submit redemption requests during this busy season.

Redesigned withdrawal forms

To simplify withdrawal requests, we’ve created separate forms for educational and non-educational withdrawals. We’ve also made some changes to language and formatting to ensure the forms are clear and easy to understand.

Form	What’s new
Educational withdrawal form	<ul style="list-style-type: none">• More pre-set options instead of free-form text fields, creating a more guided experience to reduce the potential for not-in-good-order submissions.• Proof of enrollment guidelines to help ensure all requirements are met to avoid processing delays.• Field to report Canada Education Savings Grant (CESG) previously withdrawn from other financial institutions to prevent potential overpayments of CESG.
Non-educational withdrawal form	<ul style="list-style-type: none">• Option to request Accumulated Income Payment (AIP), eliminating the need for a separate letter of direction.• New non-educational withdrawal guide, including tax implications.

The new forms are now available on the [Applications & Forms page](#) of our website, under *Registered Education Savings Plan (RESP) > Transfers/Withdrawals*.

Please note that we’ll continue to accept previous versions of the combined withdrawal form until December 31, 2025.

New proof of enrollment guidelines

The most common reason for withdrawal request rejects is invalid proof of enrollment documents. To assist in reducing NIGOs, we have new [proof of enrollment guidelines](#) that include a checklist and real-life samples of valid proof of enrollment. We’ve also added tips for advisors to help minimize processing delays.

Other changes

Our [RESP web content](#) has been refreshed for an improved user experience, and we’ve updated some additional resources like our investor brochure and pamphlet.

We’ll continue to look for ways to improve the RESP experience for dealers, advisors and clients. If you have an idea for a resource that could be helpful, please reach out to your Account Manager.

Learn more...

Did you know the Dealer Relations team offers a series of webinars to provide insights and tips for certain account types and products, including RESPs? We can also customize webinars for your dealership.

Please reach out to your Account Manager if you have questions or would like more information on our webinar offering.

Thank you for your continued support of Mackenzie Investments.

The Dealer Relations Team

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