



How to transfer an RDSP to Mackenzie Investments

1 Advisor and Investor submit forms to Mackenzie Investments

Account Opening Forms

- Mackenzie RDSP Application
- ESDC Application for Canada Disability Savings Grant and/or Canada Disability Savings Bond Including Annex A & B

Transfer Forms

- RDSP Transfer Form (EMP 5611)
- Holder Consent to RDSP Transfer (EMP 5612)

2 Mackenzie Investments sets up a new RDSP account

- If forms are in good order, Mackenzie completes section 3 of the RDSP Transfer Form
- Mackenzie sends transfer form(s) to relinquishing institution

End of month 1

- Mackenzie files registration of new RDSP to ESDC

Third week of month 2

- ESDC updates new RDSP status to "pending registration"

3 The relinquishing institution processes the transfer out

- If forms are in good order, the relinquishing institution completes section 4 & 5 of the RDSP Transfer Form
- Relinquishing institution sends RDSP Transfer Form and transfer proceeds to Mackenzie

End of month 2

- Relinquishing institution files closure of old RDSP to ESDC

Third week of month 3

- ESDC processes closure of old RDSP

4 Mackenzie Investments deposits the transfer proceeds into the new RDSP account

End of month 3

- Mackenzie re-files registration of new RDSP to ESDC

Third week of month 4

- ESDC registers new RDSP

5 Mackenzie Investments receives confirmation of account registration with notional transaction details from ESDC

6 The transfer is now complete

Peace of mind starts with a conversation

Please contact Mackenzie Client Services directly at 1-800-387-0614 or send us an email at service@mackenzieinvestments.com with any questions you may have.