

## ANNEX B – Primary Caregiver

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

Instructions:

1. Complete this annex 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 (starting in 2008) prior to the application if the beneficiary was eligible for the Disability Tax Credit for any of those years.
2. A separate annex is to be completed for each primary caregiver.
3. 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.
4. Read this document carefully. If you have any questions, do not hesitate to ask the Registered Disability Savings Plan (RDSP) issuer.
5. This form is valid only if completed, signed, dated and given to the RDSP issuer. **Do NOT send directly to Employment and Social Development Canada.**
6. Keep a copy for your records.

Beneficiary's Last Name	Beneficiary's First Name	Beneficiary's Middle Name	RDSP Contract No.
<input style="width: 95%;" type="text"/>			

### B-1 Information About the Primary Caregiver

Complete the following information if:

- you **are/were a primary caregiver** of the beneficiary; or
- you **are/were 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 (starting in 2008).**

**Primary Caregiver**

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

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

Last Name	First Name	Middle Name
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Name of Agency	Name of Agency Representative
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

For more information please refer to B-4.

Social Insurance Number / Business Number (if an Agency)

### B-2 Declaration and Consent of the Primary Caregiver

Complete this section if you are an individual.

You must read this section and sign in order for the beneficiary's RDSP to receive grants and bonds.

I understand that the provision of the information is voluntary and that I am not required to give my consent; however, if I do not give my consent, the Government of Canada may not be able to pay the grant and/or bond to the issuer in respect of this RDSP.

I confirm that I have read, understood, and received a copy of this document, including the privacy rights found in Section B-4, and I consent to the use and sharing of my personal information as outlined.

Date (yyyy-mm-dd)	Primary Caregiver's Signature
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

### B-3 Agency Attestation

Complete this section if you are the agency that received a payment was made under the *Child 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 *Child Special Allowances Act* in the current calendar year, or if applicable, I confirm that the agency identified above was issued a payment under the *Child Special Allowances Act* in the following previous calendar year(s):

<input style="width: 95%;" type="text"/>	
Date (yyyy-mm-dd)	Signature of Agency Representative
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" 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 Government of Canada needs to collect information on the primary caregiver for the years in which the beneficiary is 18 years of age or under in order to determine the amount of grant or bond. Your personal information is also used to verify your identity.

Information on the primary caregiver is 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 is based on the second preceding tax year (for example, family income for determining 2014 bond entitlement is based on the 2012 tax year). Your personal information held by the Canada Revenue Agency is used to determine the family income as well as validate the beneficiary's Disability Tax Credit eligibility and the beneficiary's residency.

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

As the beneficiary may be eligible for unused grant and bond entitlements from the previous ten years (starting in 2008) the personal information of the primary caregiver is used to determine eligibility for any year in which the beneficiary was under 19 years of age. As noted above, the family income is based on the second preceding tax year and, as a result, the use and sharing of personal information may extend as far back as 2006.

**B-4** Your Privacy Rights (continued)

The information you provide on this form is collected under the authority of 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), (including for previous years in order to determine if there are any unused grant and/or bond entitlements from those years), to calculate amounts payable and to administer the grant and bond. Information may be shared with Employment and Social Development Canada (ESDC), the Canada Revenue Agency, 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 *Income Tax Act* and 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 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 or disclosed.

Providing your personal information is voluntary. However, if you refuse to provide your personal information, ESDC will be unable to determine the amount of grant or bond in respect of the beneficiary.

The information you provide may also be used and/or disclosed by ESDC for policy analysis, research and/or evaluation purposes of RDSP, grant and/or bond administration and/or design. In order to conduct these activities, various sources of information under the custody and control of ESDC may be linked. 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 bond).

Your personal information is administered in accordance with the *Canada Disability Savings Act*, the *Department of Human Resources and Skills Development Act*, the *Privacy Act*, the *Income Tax Act* and all other applicable laws. You have the right to access and request correction to, your personal information kept in Personal Information Bank "HRSDC PPU 038". Instructions for obtaining this information are outlined in the government publication entitled *Info Source*, which is available at the following Web site address: [www.infosource.gc.ca](http://www.infosource.gc.ca). *Info Source* is also available electronically at any Service Canada Centre.

**B-5** Additional Information

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.

**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 Tax Benefit (CCTB) payment of the year (usually in January). There are circumstances where the information of the primary caregiver who is currently receiving the CCTB 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.

**Primary Caregiver:** For the purpose of the grant and bond, the primary caregiver is/are the person(s) eligible for the Canada Child Tax Benefit (CCTB) and whose name appears on the CCTB 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 the year – please identify both individuals. In addition, there may be circumstances where the beneficiary was in the care of a department, agency, or institution for part of the year – please identify both the organization as well as the individual(s).

**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-reel@hrsdc-rhdcc.gc.ca](mailto:rdsp-reel@hrsdc-rhdcc.gc.ca) Internet: [www.disabilitysavings.gc.ca](http://www.disabilitysavings.gc.ca)