

ANNEX A – Joint Holder

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

Instructions:

1. A separate annex is to be completed for each joint holder of the Registered Disability Savings Plan (RDSP) that was not identified on the *Application for Canada Disability Savings Grant and/or Canada Disability Savings Bond*.
2. Read this document carefully. If you have any questions, do not hesitate to ask the RDSP issuer.
3. 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.**
4. 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"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

A-1 Information About the Joint Holder

Complete the following information if you are also a holder of the RDSP.

- The name must be entered exactly as it appears on Social Insurance Number documentation

Joint Holder

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

A-2 Declaration and Consent of the Joint Holder

I authorize the RDSP issuer to apply for the grant and/or bond.

You must read this section and sign to receive grants and bond in the RDSP.

I confirm that the beneficiary meets all eligibility criteria identified in Section 6.1 of the *Application for the Canada Disability Savings Grant and/or Canada Disability Savings Bond*.

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 cannot pay the grant and/or bond.

If the joint holder is also a primary caregiver, Annex B must be completed.

I confirm that I have read, understood, and received a copy of this document, including the privacy rights found in Section A-3, and I consent to the use and sharing of my personal information.

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

A-3 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 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 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.

Submitting this application is voluntary. However, if you refuse to provide your personal information, ESDC will be unable to process your application.

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 about you, (such as a decision on your entitlement to a grant and/or bond).

Your personal information is administered in accordance with the CDSA, the *Department of Employment and Social Development Act*, the *Privacy Act*, the *Income Tax Act* and all other applicable laws. You have the right of access to, and to the protection of, your personal information. It will be 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. *Info Source* may also be accessed online at any Service Canada Centre.

Personal information of the plan holder is used to verify their identity in the Social Insurance Registry in order to identify the correct RDSP.

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@hrsdcc.gc.ca Internet: www.disabilitysavings.gc.ca