



Endowment 150

Find us on the web: www.rdsp.com/endowment-150

Ask a question: 604.439.9566 ext. 155

Send us an email: E150@planinstitute.ca

Helping people with disabilities save for the future

Endowment 150 offers eligible people with disabilities a one-time grant of \$150 to help their Registered Disability Savings Plan (RDSP) grow. This \$150 grant, plus grants and bonds available from the Federal Government, will grow and help you save for your future or that of a loved one.

Who can apply?

Endowment 150 is available to adult residents of BC who:

- are under 60 years of age (if 59, the individual must apply before the end of the calendar year in which he/she turns 59)
- have had low income in one year since 2008 (have received income assistance **or** annual income below \$30,450)
- have an RDSP
- have not previously received a \$150 Endowment 150 grant from Vancouver Foundation or Plan Institute

People 17 years old and younger have different eligibility criteria. For details, please see the application form for children.

How to apply ***Any missing information will result in a delay in processing your application***

1. Complete the application form on the reverse side of this page
2. Include proof of your RDSP account, which can be a recent statement; screenshot of account activity online; or financial institution letter, and **must include**
 - RDSP holder's name
 - The date within the last six months (not written on)
 - The term "RDSP" or "Registered Disability Savings Plan"
3. Confirm low income by choosing one of the following options:
 - I have received provincial income assistance at any time since January 1, 2008. **(If you can access My Self-Serve attach printed Confirmation of Assistance from myselfserve.gov.bc.ca)**
 - I have received income assistance from the Indigenous Services Canada (ISC) Persons with Disabilities (PWD) Program at any time since January 1, 2008
 - I have not received income assistance but have an annual income below \$30,450 **(attach CRA Notice of Assessment showing net income, Line 236)**
4. Grants are issued by cheque, made payable to the holder. **Please confirm with your financial institution if this is the easiest way to deposit the money into your RDSP account.**
 - a. If you prefer to receive your grant payment by Electronic Fund Transfer (EFT), please submit a void cheque or a Direct Deposit Form with your account details (obtained from your financial institution). ***Please ensure that your financial institution allows Electronic Fund Transfers to your RDSP account.**
5. Send all documentation by mail, email, or fax to Plan Institute

1. How did you hear about the Endowment 150 grant? _____

2. Eligibility Criteria

ALL criteria must apply to be eligible. Please check

The beneficiary must be considered as having low income in one year since 2008 (please see reverse for proof of income requirement)

The beneficiary must be a resident of British Columbia
 The beneficiary's RDSP account must currently be active (please see reverse for proof of RDSP requirement)

3. Beneficiary (the person with a disability who will benefit from this contribution to their RDSP)

Beneficiary First Name _____

Beneficiary Last Name _____

Mailing Address _____

City _____

BC

Postal Code _____

(_____) _____ - _____

Phone Preferred contact method

E-mail Address Preferred contact method

□ □ □ □ - □ □ □ □ - □ □ □ □

Social Insurance Number (SIN)
 (Only for MSDPR PWD confirmation)

□ □ / □ □ / □ □ □ □ □ □

Date of Birth (mm/dd/yyyy)

4. Holder (only complete this section if the RDSP beneficiary is NOT the RDSP holder)

Holder First Name _____

Holder Last Name _____

Mailing Address _____

City _____

BC

Postal Code _____

(_____) _____ - _____

Phone Preferred contact method

E-mail Address Preferred contact method

5. Disclosure

Please read carefully, check each item, and sign below

- I certify that the information provided in this application is true, correct and complete to the best of my ability.
- I certify that upon receipt of the E150, I will deposit it into the RDSP account listed above. For auditing purposes, I understand I may be required to provide proof of this deposit to Plan Institute in the future.
- I authorize Endowment 150 and/or Plan Institute staff to disclose this information to:
 - MSDPR **OR** if you reside on first nations communities, BC Aboriginal Network on Disability Society (BCANDS) to confirm receipt of income assistance; indicate First Nation that approved your income assistance _____.
 - Vancouver Foundation for reporting purposes

Signature of RDSP Holder

Date

Submit your completed application form, proof of RDSP, proof of low income (if available), and if applicable, void cheque or Direct Deposit Form by mail to **Plan Institute c/o 312 Main, 312 Main Street, 2nd Floor, Vancouver, BC V6A 2T2**; email to **e150@planinstitute.ca**; or fax to **778-300-2313**