

Application Form – Adult (RDSP Beneficiary Aged 18-59)

Website: www.rdsp.com/endowment-150

Email: e150@planinstitute.ca

Phone: 604-439-9566 extension 155

Fax: (+1) 778-300-2313

Mail: Plan Institute, 217-4388 Still Creek Drive, Burnaby, BC, V5C 6C6

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. If eligible, this \$150 deposit will attract up to \$450 in government grants, for a total of \$600 into your RDSP.

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 they turn 59)
- ✓ have had low income in at least one year since 2008
- ✓ have an RDSP
- ✓ have not previously received this grant from any organization

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

How to apply:

1. Complete the application form on the reverse side of this page or online at <https://www.surveymonkey.com/r/D9DJ7NX>
2. Include official proof of your RDSP account, such as with 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"

Please note that RDSP Application Forms are not sufficient proof of RDSP.

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 1st, 2008 I have not received income assistance but have an annual income below \$37,487 (attach CRA Notice of Assessment showing net income, Line 236)
4. Send all documentation by email, phone, fax, or mail to Plan Institute. Processing takes 6-8 weeks.

Grants by default are issued by cheque, made payable to the holder.

- 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 confirm with your financial institution the most efficient way of depositing the funds into your RDSP. If there are additional steps, such as having us make the cheque payable to the financial institution and mailing it directly there with any forms, please let us know. You must provide a signed letter of direction with your application to let us know how best to issue this payment

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We have taken every precaution to ensure that the confidential information you share through your Endowment 150 grant application is safe and secure. We are committed to your security and have put measures in place to ensure the safety of your information. If you would like to learn more, please contact our Endowment 150 support line at e150@planinstitute.ca or 604-439-9566 extension 155.

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

_____ Beneficiary First Name	_____ Beneficiary Last Name
_____ Mailing Address	_____, BC, _____ City Postal Code
(_____) _____ - _____ Phone Number	_____ Email Address
_____/_____/_____ Social Insurance Number (SIN) (Needed for PWD income assistance verification)	_____/_____/_____ Date of Birth (month, day, year)

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

_____ Holder First Name	_____ Holder Last Name
_____ Mailing Address	_____, BC, _____ City Postal Code
(_____) _____ - _____ Phone Number	_____ Email Address

What is your relationship to the beneficiary?

How did you hear about this grant?

Disclosure: Please read carefully, check each item, and sign below.

- I certify that the information provided in this application is true, correct and complete and that I have not previously received the E150 grant from any organization to the best of my ability and knowledge.
- 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.
- I authorize Endowment 150 and/or Plan Institute staff to disclose this information to:
 - o If applicable: 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_____. AND
 - o the Vancouver Foundation for reporting purposes.

_____ Holder Signature	_____/_____/_____ Date (month, day, year)
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