



Investment
Management™

COUNSEL | PORTFOLIOS

IMPORTANT NOTICE

Effective October 1, 2024, Counsel Portfolio Services Inc. and Canada Life Investment Management Ltd. have amalgamated to form Canada Life Investment Management Ltd. (CLIML). CLIML will now act as the fund manager, portfolio manager, trustee, and promoter for all Counsel funds. This change does not impact the management of the Counsel funds, and no action is required on your part.

Updating websites, materials, and forms to reflect this change will take some time. Until then, any references to Counsel Portfolio Services Inc. – whether online, in banking transactions or in print, including materials accompanying this notice – should be understood as referring to Canada Life Investment Management Ltd.

Please keep this notice with your records.

FAMILY RESP ADD BENEFICIARY FORM

Section A – Applying for Grant

YES – Appropriate Government Grant Form is attached. NO

Section B – Account Information

Counsel Account No. _____

Subscriber's Last Name _____

First Name _____

Joint Subscriber's Last Name _____
(if applicable)

First Name _____

Section C – New Beneficiary Details Required

Beneficiary's Last Name _____

First Name _____

Date of Birth _____

Social Insurance Number _____

Nature of Principal Business or Occupation Child Student Other _____

Gender: Female Male

Beneficiary's Relationship to the Subscriber(s):

Child (complete Section D only) Grandchild (complete Sections C and D) Sibling (complete Section D only)

Section D – Complete this section if the new beneficiary is a grandchild to the Subscriber(s)

Custodial Parent's Last Name _____

First Name _____

Custodial Parent's Address _____

Please confirm the relationship between the new beneficiary and the current beneficiary(ies) on the account: Siblings Cousins

Section E – Subscriber(s) Authorization

Subscriber's Signature

Date

Joint Subscriber's Signature
(if applicable)

Date

Notes:

Additional beneficiaries can only be added to a Family RESP.

Beneficiary must be connected to the subscriber(s) by blood relationship or adoption as defined by the Income Tax Act.

Beneficiary must be under the age of 21 at the time of inclusion onto the plan.

All beneficiaries on a Family RESP must be siblings in order to be eligible to receive the Additional CESG, CLB, SAGES and BCTESG.