



UNIVERSITAS

**Only complete if the subscriber is not the primary caregiver and/or custodial parent/legal guardian of the beneficiary (or beneficiaries).*

Confidentiality and Personal Information Protection

By completing the *Annex B - Primary Caregiver and/or Custodial Parent/Legal Guardian*, of the *Application for the Basic and Additional Canada Education Savings Grant (CESG) and Canada Learning Bond (CLB)*, you authorize the Universitas Foundation of Canada and Universitas Management Inc. to:

- collect your personal information and that of the beneficiary, which is necessary to manage the education savings plan(s);
- contact the beneficiary at plan maturity to provide information on how to apply for educational assistance payments (EAPs);
- create a file for this purpose and record your personal information and that of the beneficiary therein. This file will be kept at the head office and electronically accessible to the RESP subscriber’s assigned representative.
- give the subscriber’s representative and employees of Universitas Management Inc. access to your file for consultation in the exercise to their functions, such as sending you targeted promotional offers, maximization strategies, product suggestions based on your profile, or to make changes to the file for the sound management of the RESP(s).

The Universitas Foundation of Canada and Universitas Management Inc cannot disclose the content of your file unless required to do so by law.

You can refer to our *Personal Information Protection Policy* on our website at **universitas.ca** for more information about your access rights, rectification and how to revoke your consent.

Subscriber’s Name: _____ *(Print clearly)*

Beneficiary’s Name: _____ *(Print clearly)*

Signed at _____ the ____ day of _____ 201__

Primary caregiver and/or
custodial parent/legal guardian

Signature

This document must be duly signed and attached to *Annex B - Primary Caregiver and/or Custodial Parent/Legal Guardian* of the *Application for the Basic and Additional Canada Education Savings Grant (CESG) and Canada Learning Bond (CLB)*. Both documents must be returned to the representative or to Universitas Management Inc. at: 1035 Wilfrid-Pelletier Avenue, suite 500, Quebec (QC) G1W 0C5.