



Fact sheet for the new federal grant form SDE0093 and its annexes

Subscriber IS the custodial parent/legal guardian AND is the Primary Caregiver ** of the child.	Account type	New forms and requirements for the Canadian Education Savings Grant (CESG)		
		SDE0093	Annex A of the SDE0093 (if multiple beneficiaries)	Annex B* of the SDE0093 for The custodial parent/legal guardian <u>and</u> the Primary Caregiver**
Yes	Individual	Yes, To be completed by the Subscriber	No	No
No	Individual	Yes, To be completed by the Subscriber	No	Yes, has to be completed by the custodial parent/legal guardian <u>and</u> Primary Caregiver (If 2 different people, each individual needs to complete Annex B)
Yes	Family	Yes, To be completed by the Subscriber	Yes	No
No	Family	Yes, To be completed by the Subscriber	Yes	Yes, has to be completed by the custodial parent/legal guardian and Primary Caregiver (If 2 different people, each individual needs to complete Annex B)

***ANNEX B**, It is mandatory to complete section **B3** (beneficiary info)

**The Primary Caregiver is the person who is registered to receive the Canada Child Tax Benefit (family allowance) - usually the mother of the child.

Can the same parent be the custodial parent and the Primary Caregiver? **YES.**

Example of a situation where the subscriber, the Primary Caregiver and the custodial parent/legal guardian are 3 different individuals:

The subscriber will sign the opening form and the SDE 0093

The Primary Caregiver will sign Annex B, section 1 and 3 (join Annex A if necessary)

The custodial parent/legal guardian will sign Annex B, section 2 and 3 (join Annex A if necessary)