

Mackenzie Internal Procedures

Scenario	Document(s) Required
<p align="center">Removing one subscriber from a joint account</p>	<p>A letter of direction signed by both subscribers signature guaranteed. OR Client signed letter of direction with marriage breakdown documentation (i.e. divorce decree, separation agreement, court order). Note: A new account number will be assigned for privacy reasons.</p>
<p align="center">Adding a spouse/common law partner as a joint subscriber to an Individual RESP</p>	<p>A letter of direction signed by the current subscriber AND A Mackenzie RESP Individual application signed by the new subscriber with section 2 completed. Note: Account number will stay the same.</p>
<p align="center">Adding a spouse/common law partner as a joint subscriber to a Family RESP</p>	<p>A letter of direction signed by the current subscriber AND A Mackenzie RESP Family application signed by the new subscriber with section 2 completed. Note: Account number will stay the same.</p>
<p align="center">Adding a beneficiary to an existing Family RESP</p>	<p>A letter of direction signed by the subscriber(s) with the new beneficiary's name, social insurance number, date of birth, gender and subscriber-beneficiary relationship (i.e. son, daughter).</p>
<p align="center">Transferring a client held Individual RESP to a new client held Family Plan</p>	<p>A Mackenzie Family RESP application. AND A letter of direction signed by the subscriber(s) requesting the transfer. AND A HRSDC grant application for each new beneficiary on the family plan. (Note: A grant application is not required for the beneficiary on the current individual account provided there is no change to the grants applied for or the subscribers).</p>