

RESP

Proof of Enrolment Guidelines

Effective August 2020



When processing an Educational Assistance Payment (EAP) or a Post-Secondary Education withdrawal (PSE) from a Registered Education Savings Plan (RESP), CI Investments (CI) requires a completed CI RESP Educational Assistance Payment (EAP) form. If Section D - Verification of Enrolment on the CI RESP EAP form is not completed, CI also requires a valid current proof of enrolment (POE) document.

For a POE document to be considered as valid, it must meet the following six mandatory criteria:

Mandatory Criteria	Notes
1. Full name of student	Must include the student's first and last name
2. School name	Letterhead, school logo or website address of the post-secondary educational institution
3. Academic term and year enrolled	Must be current or within six months following the end of the latest completed term
4. Date issued	Date of when the POE document was issued
5. Program of study	Program name or list of enrolled courses
6. Full-time or part-time status	Can be indicated in number of weeks and/or hours per academic session to determine enrolment in a qualifying educational program or specified educational program

Valid and Invalid POE Examples

Please note that the documents are not limited to the following examples and a combination of documents may be necessary to confirm the beneficiary's enrolment status.

Valid Document	Invalid Document
<ul style="list-style-type: none"> Enrolment letter Invoice*, receipt of payment, or receipt of deposit paid for tuition or on-campus school residence Timetable or course schedule Transcript Tuition and Enrolment Certificate (T2202, T2202A or TL11A) Acceptance letter* Electronic document ** 	<ul style="list-style-type: none"> Offer of admission Student card

NOTES

* If an invoice or acceptance letter indicates a minimum deposit is required to secure a seat in the program, CI will not redeem more than the amount on the invoice or acceptance letter. Additional valid POE or confirmation of registration is required to redeem the remaining amounts.

** An electronic document may include a screenshot or attachment to an email, or the email correspondence issued by the school itself. The document must illustrate the six mandatory criteria in order to be valid.